DOCUMENT RESUME

ED 277 386 IR 051 729

AUTHOR	Klingberg, Susan; And Others
TITLE	Strategic Planning for ACRL. Final Report of the ACRL Strategie Planning Task Force.
INSTITUTION	Association of Coll. and Research Libraries, Chicago, Ill.
PUB DATE	1 Jul 86
NOTE	155p.
PUB TYPE	Legal/Legislative/Regulatory Materials (090) -- Viewpoints (120)
EDRS PRICE	MF01/PC07 Plus Postage.
DESCRIPTORS	*Academic Libraries; Higher Education; Library Associations; *Library Planning; Library Services; *Long Range Planning; Mission Statements; Needs Assessment; *Objectives; Professional Development; Public Relations; Recruitment; *Research Libraries; Research Opportunities; User Needs (Information)
IDENTIFIERS	Association of College and Research Libraries

ABSTRACT

The 5-year plan of the Association of College and Research Libraries (ACRL) is presented, and the four goals of the plan are summarized: (1) to contribute to the total professional development of academic and research librarians; (2) to enhance the capability of academic and research libraries to serve the needs of users; (3) to promote and speak for the interests of academic and research librarianship; and (4) to promote study, research, and publication relevant to academic librarianship. In addition, the following aspects of the plan, planning process, and implementation are discussed: working principles underlying the plan; the planning model; the planning process; executive summary of goals, objectives and their sources; mission statement; strategic management directions; and implementation (overview, timeline, recommended changes in financial policies, development of the annual operating plan, and dissemination). A Member Needs Report, Strategic Factors Report, Strategic Audit Report, Resources Report, and "A Proposed Planning Process for the Association of College and Research Libraries" are appended. (KM)

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STRATEGIC PLANNING FOR ACRL

Final Report of the
ACRL Strategic Planning Task Force
Susan Klingberg, Chair
David F. Bishop
Sharon A. Hogan
Donald Riggs
Keith W. Russell
Carla J. Stoffle
JoAn S. Segal

Presented to the ACRL Board
and approved, July 1, 1986
ALA Annual Conference, N. Y.

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MEMORANDUM

Date: May 13, 1986

To: ACRL Board of Directors

From: ACRL Strategic Planning Task Force

The Task Force is pleased to submit the attached report **Strategic Planning for ACRL.** It contains the five-year strategic plan the Task Force was charged with developing. Because the planning process relied on the preparation of analyses and reports on subjects such as members' needs and environmental factors, the key working papers have also been included.

In the course of its work, the Task Force has thoroughly examined ACRL's resources and its wide range of activities. We have received a great deal of assistance and support for our project from many levels within ACRL, including members, elected leaders, units, and staff. Given its resources and active membership, ACRL faces a bright future.

Susan Klingberg, Chair
David F. Bishop
Sharon A. Hogan, ACRL President
Donald Riggs
Keith W. Russell
Carla J. Stoffle
JoAn S. Segal, ACRL Executive Director (ex officio)

Note: Dr. Stevan Holmberg, Consultant and President of the Professional Management Research Group, presented a workshop on strategic planning for the Task Force at the outset of the project.

I. INTRODUCTION

A. Working Principles Underlying ACRL Strategic Plan

1. ACRL supports the professional development of academic and research librarians in a variety of ways:

   - ° opportunities for professional development should be made more accessible
     - * through lowered fees
     - * through regional offerings
   - ° members should help determine the content, and format, of such opportunities
   - ° cooperation with other associations should be supported in this area
   - ° awards are an effective way to promote a sense of professional identity

2. ACRL assists its members with career placement.

3. ACRL helps members to provide good service to users.

   - ° develops and promulgate standards and guidelines
   - ° helps librarians understand the accreditation process
   - ° plays some role in the provision of timely and accurate statistics
   - ° provides advisory services
   - ° encourages and evaluate innovation
   - ° helps libraries which serve minorities

4. ACRL works to increase understanding and appreciation of the role of libraries among members of the academic community (faculty, administrators, trustees, and friends).

5. ACRL works to increase understanding and appreciation of the key issues in higher education among librarians.

6. ACRL is the organization that is perceived as speaking for the academic library profession on issues of importance to higher education and academic and research libraries.

7. ACRL plays a role in influencing legislation and funding for academic and research libraries.

8. ACRL plays a role in recruitment and retention of academic and research librarians.

9. ACRL helps shape library education in accord with the needs of academic and research librarianship.

10. ACRL is committed to advancing knowledge and practice through the provision of a climate conducive to the conduct and dissemination of research.

11. ACRL serves the needs of segments of the academic and research library community even if such service cannot be made self-supporting.

12. ACRL is a strong, well-managed professional association capable of carrying out the substantive program contained in the Plan.

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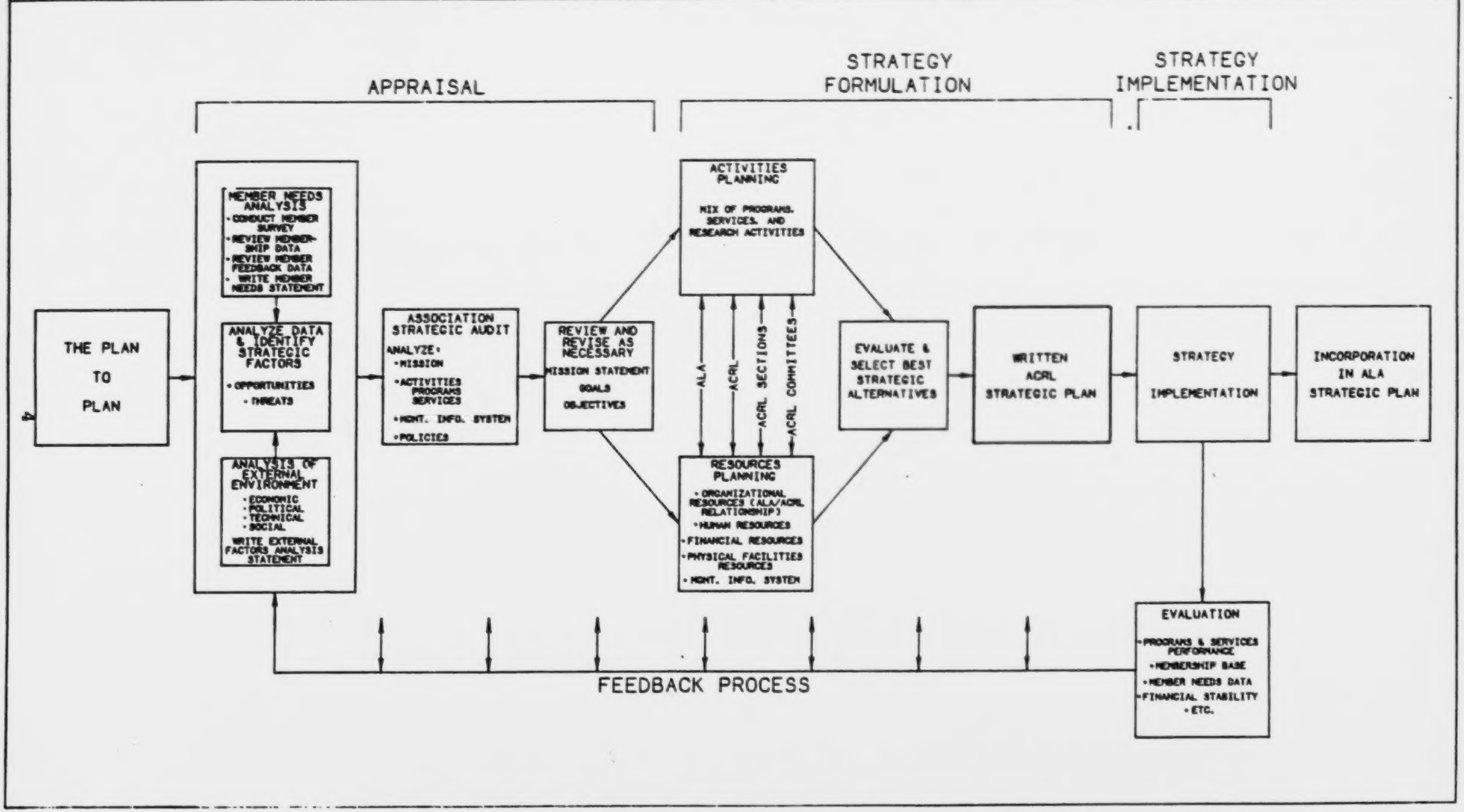
ACRL STRATEGIC PLANNING MODEL


APPRAISAL
STRATEGY FORMULATION
STRATEGY IMPLEMENTATION
THE PLAN TO PLAN
MEMBER NEEDS ANALYSIS
• CONDUCT MEMBER SURVEY
• REVIEW MEMBERSHIP DATA
• REVIEW MEMBER FEEDBACK DATA
• WRITE MEMBER NEEDS STATEMENT
ANALYZE DATA & IDENTIFY STRATEGIC FACTORS
• OPPORTUNITIES
• THREATS
ANALYSIS OF EXTERNAL ENVIRONMENT
• ECONOMIC
• POLITICAL
• TECHNICAL
• SOCIAL
WRITE EXTERNAL FACTORS ANALYSIS STATEMENT
ASSOCIATION STRATEGIC AUDIT
ANALYZE:
• MISSION
• ACTIVITIES PROGRAMS SERVICES
• MGMT. INFO. SYSTEM
• POLICIES
REVIEW AND REVISE AS NECESSARY
MISSION STATEMENT
GOALS
OBJECTIVES
ACTIVITIES PLANNING
MIX OF PROGRAMS, SERVICES, AND RESEARCH ACTIVITIES
ALA
ACRL
ACRL SECTIONS
ACRL COMMITTEES
RESOURCES PLANNING
• ORGANIZATIONAL RESOURCES (ALA/ACRL RELATIONSHIP)
• HUMAN RESOURCES
• FINANCIAL RESOURCES
• PHYSICAL FACILITIES RESOURCES
• MGMT. INFO. SYSTEM
EVALUATE & SELECT BEST STRATEGIC ALTERNATIVES
WRITTEN ACRL STRATEGIC PLAN
STRATEGY IMPLEMENTATION
INCORPORATION IN ALA STRATEGIC PLAN
EVALUATION
• PROGRAMS & SERVICES PERFORMANCE
• MEMBERSHIP BASE
• MEMBER NEEDS DATA
• FINANCIAL STABILITY
• ETC.
FEEDBACK PROCESS

ACRL PLANNING PROCESS SUMMARY

STEPS	PRODUCT	RESPONSIBILITY
APPRAISAL		
(1) Analyze member needs	MEMBERS' NEEDS STATEMENT (based on existing membership data & analysis of President's survey)	ACRL hq. staff, with assistance from Membership Committee and President's Research Team
(2) Analyze external environment	EXTERNAL FACTORS ANALYSIS STATEMENT (including review & update of activity model reports)	ACRL Planning Committee (Ball, McDonald, Klingberg, etc.)
(3) Identify strategic factors	STRATEGIC FACTORS REPORT (based on steps 1 & 2)	Task Force (Segal)
(4) Conduct a strategic audit	STRATEGIC AUDIT REPORT	ACRL hq. staff and Task Force (Segal & Hogan)
(5) Review & revise ACRL mission, goals, & objectives	Written revisions, if necessary	Task Force (Russell)
STRATEGY FORMULATION		
(6) Carry out activities planning	ACTIVITIES PLANNING REPORT (written recommendations, including ACRL publications	Task Force (Bishop & Riggs)
(7) Carry out resources planning	RESOURCES PLANNING REPORT (including relationship of ACRL to ALA)	ACRL hq. staff and Hogan
(8) Evaluate & select best strategic alternatives	Working document, to be incorporated in five-year plan	Task Force
(9) Prepare written five-year strategic plan	ACRL STRATEGIC PLAN, 1986-1990	Task Force

STEPS	PRODUCT	RESPONSIBILITY
STRATEGY IMPLEMENTATION		
(10) Implement the strategy	---- ----	ACRL Planning Committee
EVALUATION		
(11) Evaluate and update the plan, annually or biennially	Revisions and update	ACRL Planning Committee
ADDITIONAL RECOMMENDATIONS		
(12) Revise the charge of the ACRL Planning Committee to place more emphasis on planning	Revised charge	ACRL Planning Committee

sk:1/85
rev. 6/12/85

C. Executive Summary of Goals, Objectives, and their Sources

This plan was developed by the ACRL Strategic Planning Task Force, using a number of key sources. These included the following:

1. The Activity Model for the 1990's.

   Developed by a Committee appointed by President David Weber in 1980, the Activity Model was published in May, 1982. It provided the mission statement, goals, and objectives under which ACRL has since operated, and served as the basis for the present plan.

2. Membership Survey, 1984-85.

   President Sharon Rogers carried out a survey of a random sample of ACRL members in the winter of 1984-85. Results indicated ten major areas of agreement on desirable activities.

3. President's Program, ALA Annual Conference, 1985.

   Over 500 ACRL members attended the President's Program. They were asked to rank possible activities. The five top-ranked activities were: publications, continuing education, standards, liaisons, and chapters. They then brainstormed ideas on implementing these activities. Staff summarized these comments for the Task Force's use.

4. Open Forum, Midwinter, 1986.

   About thirty persons attended an open forum to discuss the draft mission, goals, subgoals, and objectives published in the December C&RL News. Their comments were incorporated into this Plan.

5. Personnel Study Group Report.

   The Academic and Research Library Personnel Study Group was appointed to assess the adequacy of current programs and committee activities in light of ACRL's goals. They were to look specifically at: professional education, counseling, career development, status and perquisites, and similar aspects of staffing, careers, and personnel administration in academic and research librarianship. The Group made its final report in September, 1985 and the Task Force undertook to integrate the recommendations into the Plan.

6. Other.

   Individual members wrote to the staff or the Task Force with recommendations. Suggestions with planning implications coming from committees and other units were also considered.

II. THE PLAN

GOAL BY GOAL SUMMARIES:

These summaries indicate for each goal all subgoals and objectives. Key objectives (of highest priority) are starred. Sources for the goals, subgoals, and objectives are summarized briefly, and some of our current activities in these areas are also briefly identified, to indicate the continuity of the plan with present and past association activities. It should be emphasized that the strategic plan indicates certain priorities, but that many regularly-occurring activities - not mentioned in the strategic plan will continue.

GOAL I. TO CONTRIBUTE TO THE TOTAL PROFESSIONAL DEVELOPMENT OF ACADEMIC AND RESEARCH LIBRARIANS.

Subgoal A. To sponsor and encourage opportunities for academic and research librarians to update existing competencies, learn requisite new skills, and gain awareness of the state of the art.

* Objective A1. Lower the cost to participate in ACRL professional development activities, as compared to 1984-85 levels.
* Objective A2. Expand the number of opportunities for academic and research librarians to participate in professional development activities at regional locations.
Objective A3. Increase financial support for section programs and projects.
Objective A4. Create an ongoing process for assessing educational needs and evaluating the success of ACRL professional development activities.
Objective A5. Coordinate ACRL CE program with those of related organizations.

Subgoal B. To promote a sense of professional identity and peer reinforcement among academic and research librarians.

Objective B1. Review the policies for establishing awards within ACRL.
Objective B2. Review the procedure for administering awards to ensure they are effectively providing a sense of professional identity and peer reinforcement.

Subgoal C. To provide career counseling and placement information regarding academic and research librarianship.

Objective C1. Promote timely and comprehensive information about professional positions available.

SOURCES FOR GOALS, SUBGOALS, AND OBJECTIVES:

1. Activity Model:

Goal I has remained unchanged in wording.
Subgoal A. is the same as objective A.
Subgoal B. is the same as objective E.
Subgoal C. is the same as objective F.

2. Membership Survey:

69% of the respondents, 175 people, found the statement:
"Continuing education programs should be encouraged and expanded in order to allow academic and research librarians to learn new skills and update competencies," very desirable. This was question #1.

52%, or 134 people, ranked as very desirable, question #7:
"ACRL chapters should encourage a sense of professional identity and peer reinforcement so that those members unable to attend separate national conferences are not alienated."

3. President's Program:

Number two priority was assigned to this statement.
"ACRL continuing education programs should be expanded so that academic/research librarians may learn new skills and keep old skills current."
The following ranked fifth:
"ACRL should support state and regional chapters in order to encourage a sense of professional identity and peer reinforcement."

In the brainstorming session, members stressed the lowering of costs to participate, the offering of courses at a regional level, alternate delivery systems, linking with other associations for continuing education efforts, and specific ideas for course content. They also suggested programming assistance for chapters, asked for increased chapter funding, indicated need for help to new chapters, and recommended improving communication with chapters.

4. Personnel Study Group Report:
Recommended coordinating continuing education programs with other associations.

CURRENT ACTIVITIES:

Continuing Education courses are being offered at Midwinter, Annual Conference, and at ACRL National Conferences.

ACRL's National Conferences offer learning opportunities.

Sections offer programs at ALA Annual Conferences; receive some ALA funding.

Funded Projects allow ACRL to present workshops, such as the Humanities Programming Workshops funded by NEH.

Awards now given include:

Academic/Research Librarian of the Year
Miriam Dudley BI Librarian of the Year
Oberly Award
Lazerow Award
ISI Doctoral Dissertation Fellowship
RBMS
WESS/Nijhoff

A Placement Service is provided at Division National Conferences

GOAL II. TO ENHANCE THE CAPABILITY OF ACADEMIC AND RESEARCH LIBRARIES TO SERVE THE NEEDS OF USERS.

Subgoal A. To develop standards and guidelines.

* Objective A1. Develop guidelines for evaluating the performance and output of academic libraries.
* Objective A2. Increase dissemination of ACRL standards and guidelines throughout the higher education community.
* Objective A3. Increase librarians' understanding of the accreditation process and the role of the library in institutional accreditation.
* Objective A4. Increase the understanding of the statistics gathering process and the role of ACRL and other organizations in identifying, collecting and disseminating academic library statistics.

Subgoal B. To provide advisory services concerning academic and research libraries and librarianship.

Objective B1. Publicize availability of advisory services.

Subgoal C. To identify, explore, and act on problems and issues facing academic and research libraries.

Subgoal D. To encourage and evaluate innovation in library operations and services.

* Objective D1. Increase publicity about innovative activities.

Subgoal E. To strengthen libraries in Traditionally Black Institutions.

Objective D1. Assess the most effective way ACRL can assist these libraries.
Objective D2. Implement a program based on above assessment.

SOURCES FOR GOALS, SUBGOALS, AND OBJECTIVES:

1. Activity Model:

Goal II is conceptually the same as Goal 2.
Subgoal A is conceptually the same as Objective A.
Subgoal B is conceptually the same as Objective B.
Subgoal D is conceptually the same as Objective C.

2. Membership Survey:

The following statements were rated very desirable by over 50% of the respondents:

"ACRL needs to vigorously promote standards and guidelines for personnel, collections, references, etc." 53% (133 people)
"ACRL should strengthen and better publicize its advisory services that are provided to libraries and academic institutions." 53% (130)

3. President's Program:

Standards were ranked third; advisory services eighth.

Brainstorming highlights included: suggestion of closer work with accreditation agencies; request for more publicizing of standards; more coordination; identification of areas needing guidelines or standards; help in implementation.

4. Open Forum:

Asked for aid to libraries in providing service to users
Asked for more on improving access to information
Asked for greater impact on the accreditation process
Asked for the inclusion of statistics.

5. Personnel Study Group Report:

No specific recommendations.

6. Other:

No specific recommendations.

GOAL III. TO PROMOTE AND SPEAK FOR THE INTERESTS OF ACADEMIC AND RESEARCH LIBRARIANSHIP.

Subgoal A. To enhance awareness of the role of academic and research libraries among non-library professionals and organizations (e.g., accrediting bodies, higher education associations, scholarly and professional societies) and to develop effective working relationships with them.

* Objective A1. Create oportunities for academic librarians to interact with other professionals in the academic community.
Objective A2. Develop new alliances with other professional organizations.
Objective A3. Develop materials library staff can use to enhance administrators' understanding of academic libraries.

Subgoal B. To monitor and speak out on government and private sector activities likely to affect academic and research librarianship, including legislation, and fiscal and political support at all levels.

* Objective B1. Establish ACRL as the association with the authority to speak for the academic library profession on issues of importance to higher education and academic libraries.
* Objective B2. Strengthen membership efforts to affect and influence government and private sector activities, including legislation, funding, and quality higher education.
Objective B3. Provide assistance for librarians seeking additional fiscal support for their libraries.

Subgoal C. To support and participate in the recruitment of outstanding persons to the field of academic and research librarianship.

Objective C1. Develop mechanisms to attract high quality candidates.
Objective C2. Support the recruitment of members of underrepresented groups to academic librarianship.
Objective C3. Promote the adoption of personnel policies that enhance the status, professional development, and working conditions of academic librarians.

Subgoal D. To help shape library education programs in accord with the needs of academic and research librarianship.

Objective D1. Develop an action plan describing how library schools might address academic/research library needs.

SOURCES:

1. Activity Model:

Goal statement is exactly the same.
Subgoal A is similar to Objective B; Subgoal B is similar to Objective F;
Subgoal C is similar to Objective C; Subgoal D is the same as Objective D.

2. Membership Survey:

These statements were rated very desirable:

"Fiscal and political support (including support of appropriate legislation) for academic and research librarians needs to be strengthened." 59% (146)

"ACRL should strive to increase public awareness of the role of academic and research libraries." 60% (150 people)

"Awareness of the role of academic and research libraries should be enhanced by ACRL among such groups as scholarly and professional organizations." 60% (150 people)

"ACRL should monitor and help shape library needs of academic and research librarianship." 50% (123 people)

"ACRL should take a more active role in speaking out on government activities of potential impact upon academic and research librarianship." 52% (130)

"[ACRL should] strengthen alliances with other professional and scholarly organizations" (e.g., the AAAS, ACE, etc.) 53% (133 people)

"[ACRL should] encourage ACRL members to attend meetings of other professional associations." 50% (126 people)

GOAL IV. TO PROMOTE STUDY, RESEARCH & PUBLICATION RELEVANT TO ACADEMIC AND RESEARCH LIBRARIANSHIP.

Subgoal A. To identify study and research topics & to encourage improvement in research skills.

* Objective A1. Develop research priorities regarding academic libraries and their role in higher education.

Objective A2. Develop incentives or programs to encourage librarians to engage in research.

Subgoal B. To support research projects, report works in progress and disseminate research results.

* Objective B1. Seek grant funds for the creation of research awards and for carrying out research projects.

Subgoal C. To advance the professional knowledge of academic librarians through an effective publishing program.

Objective C1. Explore electronic publishing possibilities for ACRL publications.

* Objective C2. Review the ACRL publications program to ensure that it supports Association mission, goals, and objectives.

SOURCES OF GOALS, SUBGOALS, AND OBJECTIVES:

1. Activity Model:

Goal IV is similar to Goal 4
Subgoal A is similar to Objective C
Subgoal D is similar to Objective A

2. Membership Survey:

The following statements received high agreement on desirability:

"Publications (e.g., C.E. syllabi, conference proceedings, books, journals) should continue to be sponsored by ACRL." 56% (142 people)

"Research leaves for academic and research librarians should be encouraged." 63% (161 people)

3. President's Program:

Ranking: Publications ranked #1.

Brainstorming:

Participants encouraged paid research leaves for librarians, suggested grant funding for research, suggested electronic publishing, and supported a review of the publishing program.

4. Open Forum:

   Suggested Choice, BCL III be here, rather than in Goal II.

5. Personnel Study Group Report:

   No specific recommendations.

6. Other:

   Members at Research Clinic and Research Development Committee recommended publishing a manual on research.

A. MISSION STATEMENT FOR ACRL

The mission of the Association of College and Research Libraries (ACRL) is to foster the profession of academic and research librarianship and to enhance the ability of academic and research libraries to serve effectively the library and information needs of current and potential library users.

B. ACRL STRATEGIC PLAN

Goal: I. To contribute to the total professional development of academic and research librarians.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To sponsor and encourage opportunities for academic and research librarians to update existing competencies, learn requisite new skills, and gain awareness of the state of the art.	*A1. Lower the cost to participate in ACRL professional development activities (as compared with 1984-85 levels).	a. Offer 2 free-tuition scholarships for ACRL professional development activities each year.	°Prof.Ed.Comm. recommend guidelines °Board action	°$	1986-87?
		b. Offer at least one new workshop, institute, or symposium designed for large group attendance (in addition to small-attendance courses) in each of next 3 years.	°Prof. Ed. Comm. brainstorm ideas °Staff design and implement °Member assistance w/local arrangements	°Risk capital °Staff time °Volunteers	1986-89
		c. Offer volume discounts for ACRL C.E. courses.	°Staff recommend budgeting tactics °Prof. Ed. Comm. discuss °B&F recommend °Board approve	°$	1987-88
		d. Contact at least 4 outside funding sources; develop and submit at least one proposal for funding a professional development activity.	°Section or comm. suggest Board approve °Staff write proposals and follow through	°Staff time	1987-89

*Starred objectives were identified as priority areas.

ACRL STRATEGIC PLAN

Goal: I. To contribute to the total professional development of academic and research librarians.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To sponsor and encourage opportunities for academic and research librarians to update existing competencies, learn requisite new skills, and gain awareness of the state of the art.	*A2. Expand the number of opportunities for academic and research librarians to participate in professional development activities especially at regional locations.	a. Increase funding for Chapters Special Programming Fund to support professional development activity at the regional/local level.	°Staff plan, budget °B&F recommend °Board approve °Chapters Council implement °Staff administer	°$	1987-91
		b. Hold a national ACRL Conference every 3 years in targeted regions of the country.	°Program Comm. °Staff °Local chapter(s)	°$ °Staff time °Volunteers	1989 1992
		c. Prepare and present at least one new program at a regional/local site.	°Prof. Ed. Comm. discuss °Staff plan and implement °Local chapter members' assistance with local arrangements	°$ °Staff time	1986-91
		d. Offer at least one C.E. course via an alternative mode (mail, video, etc.)	°Staff survey field °Consultant °Staff learn how to implement	°Consulting fee °Staff time °$ for staff training °CJCLS	1986-91

*Starred objectives were identified as priority areas.

JSS 86 10/24
SP2

ACRL STRATEGIC PLAN

Goal: I. To contribute to the total professional development of academic and research librarians.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To sponsor and encourage opportunities for academic and research librarians to update existing competencies, learn requisite new skills, and gain awareness of the state of the art.	A3. Increase financial support for section programs and projects.	a. Create a special Sections Programming Fund to be used to support programs at ALA annual conference.	°Activity Sections Council and CLS, CJCLS, ULS, Exec. Comm. recommend plan °Staff: budget implications °After budget approval, above units implement °Staff administer	°$ °Staff time °Member volunteers	1987-89
		b. Target the STS, CJCLS, and CLS sections for special development and activities	°STS, CJCLS, CLS Exec. Comm. design programs, assess $ needs °Staff provide extra support	°Staff time °$ °Member Comm. work	°1987-91
		c. Partially subsidize one preconference for a section which has never had one before.	°Section plan, implement °Staff support and administer	°$ °Staff time °Member	1987-91
		d. Partially subsidize publication of at least one scholarly bibliography in a subject discipline, for which there is not a large enough audience to attract a commercial publisher.	°Section or comm. members prepare bibliography °Publications Comm. °Staff implement publications	°$ °Staff time °Member authors	1987-91

*Starred objectives were identified as priority areas.

Goal: I. To contribute to the total professional development of academic and research librarians.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To sponsor and encourage opportunities for academic and research librarians to update existing competencies, learn requisite new skills, and gain awareness of the state of the art.	A4. Create an ongoing process for assessing educational needs and evaluating the success of ACRL professional development activities.	a. Develop and administer national ACRL needs assessment and evaluation survey every 5 years and disseminate results to appropriate units.	°Prof. Ed. Comm. monitor, advise °Staff (with consultant?) develop questionnaire, pretest, select target, distribute, tabulate, etc.	°$ °Staff time	1986-91
	A5. Coordinate ACRL C.E. program with those of related organizations.	a. Establish links with library schools, library and other professional associations for cooperative professional development activities.	°Prof. Ed. Comm. °Section Education Comms. °Prof. Assoc. Liaison Comm.	°$ °Staff time °Volunteers	1986-91
B. To promote a sense of professional identity and peer reinforcement among academic and research librarians.	B1. Review the policies for establishing and administering awards within ACRL.	a. Compare with other ALA awards.	°Staff collect information	°Staff time	1987-88
		b. Decide on best implementation mechanism.	°Staff suggest °Awards Comms. review °Board approve	°Staff time °Volunteers	1988-
	B2. Review the procedure for administering awards to ensure they are effectively providing a sense of professional identity and peer reinforcement.	a Compare with other ALA awards.	°Staff collect information °Awards Comms. review	°Staff time °Volunteers	1987-88

*Starred objectives were identified as priority areas.

JSS 86 10/24
SP4

ACRL STRATEGIC PLAN

Goal: I. To contribute to the total professional development of academic and research librarians.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
B. To promote a sense of professional identity and peer reinforcement among academic and research librarians.	B2. Review the procedure for administering awards to ensure they are effectively providing a sense of professional identity and peer reinforcement.	b. Consider establishing an ACRL awards banquet or luncheon.	°Board approval °All Awards Comm. °Staff implementation	°Staff time °Volunteer time	1988
C. To provide career counseling and placement information regarding academic and research librarianship.	C1. Promote timely and comprehensive information about professional positions available.	a. Provide a placement service at Division national conferences.	°ALA staff member under contract °Staff coordinate, assist	°Consultant °Travel $ °Staff time	1986 1989 1992
		b. Analyze the economics of providing an on-line positions-available database.	°Staff analyze (w/consulting help?) and recommend °Board action °Staff implement	°$ °Consultant? °Staff time	1986-87
		c. Investigate the practicality and fundability of an exchange program among North American college librarians.	°CLS analyze (w/staff and/or consulting help?) and recommend °Board action °Staff implement	°$ °Consultant? °Staff time	1987-88

*Starred objectives were identified as priority areas.

JSS 86 10/24

SP5

ACRL STRATEGIC PLAN

Goal: II. To enhance the capability of academic and research libraries to serve the needs of users.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To develop standards and guidelines.	*A1. Develop guidelines for evaluating the performance and output of academic libraries.	a. Provide funds to implement the recommendations of the Task Force on Performance Measures, specifically to produce a manual.	°Standards and Accreditation review °Board action °Staff write RFP for writing of a manual and assist in mechanics of consultant selection	$ °Staff time °Contract	1985-89
	*A2. Increase dissemination of ACRL standards and guidelines throughout the higher education community.	a. Distribute every new ACRL standard to academic administrators, accrediting agencies, and higher education associations.	°Standards and Accreditation recommend °Board approval °Staff implement	°$ °Staff time	1986-
		b. Write articles and announcements on ACRL standards for at least 2 non-library publications.	°Members' articles solicited °Staff support in placing articles	°Member effort °Staff time	1986-88
	*A3. Increase librarians' understanding of the accreditation process and the role of the library in institutional accreditation.	a. Develop an accreditation package for librarians whose institutions are undergoing regional accreditation	°Standards and Accreditation Comm. select and monitor °Consultants prepare pkg. °Staff arrange publication and dissemination	°$ °consultant fees °Staff time	1985-87

*Starred objectives were identified as priority areas.

JSS 86 10/24

SP6

ACRL STRATEGIC PLAN

Goal: II. To enhance the capability of academic and research libraries to serve the needs of users.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To develop standards and guidelines.	*A3. Increase librarians' understanding of the accreditation process and the role of the library in institutional accreditation.	b. Provide material to accrediting associations on how to evaluate an academic library.	°Standards and Accreditation Comm. suggest procedure °Board approve °Staff implement (w/ consultant?)	°$ °Consultant °Staff time	1986-89
	*A4. Promote the identification, collection, and dissemination of academic library statistics.	a. Monitor ongoing government activity.	°Academic Lib. Statistics Comm.	°Volunteer time	1986-
		b. Actively participate in national decision-making.	°Academic Lib. Statistics Comm.	°Volunteer time	1986-
		c. Coordinate efforts with outside agencies and other ALA units.	°Academic Lib. Statistics Comm. °Staff	°Staff time °Volunteer time	1987-
		d. Develop & publish in C&RL News a background paper on the statistics-gathering process for academic & research libraries.	°Academic Lib. Statistics Comm. write or commission	°Volunteer time	1987-
		e. Play a role in defining data elements most commonly used in collecting academic library statistics.	°Academic Lib. Statistics Comm.	°Volunteer time	1987-
B. To provide advisory services concerning academic and research libraries and librarianship.	B1. Publicize availability of Advisory Services.	a. Report on interesting questions, failures.	°Staff	°Staff time	1986-

*Starred objectives were identified as priority areas.

JSS 86 10/24
SP7

Goal: II. To enhance the capability of academic and research libraries to serve the needs of users.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
C. To identify, explore, and act on problems and issues facing academic and research libraries.	C1. Use ACRL programs and publications to identify and explore key issues and problems.				
D. To encourage and evaluate innovation in library operations and services.	*D1. Increase publicity about innovative activities.	a. Encourage units to identify innovation in their areas of specialization.	°Member units	°Member time	1986-
		b. Continue regular reports in C&RL News on successful innovations.	°Member units °Staff implement	°Staff time	1986-
E. To strengthen libraries in institutions serving minorities.	E1. Assess the most effective way ACRL can assist these libraries.	a. Hold a workshop to bring together librarians to give us advice.	°Approval: Board °Staff seek funding, carry out program	°$ for travel, program °Staff time	1986-87
	E2. Implement an ongoing program based on above assessment.				1987-

Goal: III. To promote and speak for the interests of academic and research librarianship.

A. To enhance awareness of the role of academic and research libraries among non-library professionals and organizations (accrediting bodies, higher education associations, scholarly and professional societies, etc.) and to develop effective working relationships with them.	*A1. Create opportunities for academic librarians to interact with other professionals in the academic community.	a. Sponsor joint programs with 2 targeted associations in the next 5 years.	°ACRL Board approval °Prof. Assoc. Liaison Comm. °Staff negotiate w/other associations	°$ °Staff time °Volunteer time	1986-91
		b. ACRL journal editors will publish at least one article per year by a non-librarian.	°Journal editors	°Staff time °Volunteer time	1986-88

*Starred objectives were identified as priority areas.

JSS 86 10/24
SP8

ACRL STRATEGIC PLAN

Goal: III. To promote and speak for the interests of academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To enhance awareness of the role of academic and research libraries among non-libra-professional and organizations (accrediting bodies, higer education associations, scholarly and professional societies, etc.) and to develop effective working relationships with them.	*A1. Create opportunities for academic librarians to interact with other professionals in the academic community.	c. Offer discounted ACRL Conference fees to members of targeted associations.	°ACRL Board approval °Staff estimate $ impact °Staff negotiate w/other associations	°$ °Staff time	1989
		d. Sponsor 2 forums or workshops, with invited papers by non-librarians in the next 5 years.	°Staff design and implement °Membership, section, or president's program?	°$ °Staff time °Volunteer time	1986-91
		e. Provide financial support to librarians making presentations at non-library meetings.	°Prof. Assoc. Liaison Comm.	°Volunteer time °Travel $	1986-
	A2. Develop new alliances with other professional organizations.	a. Visit at least 6 other associations a year and set up one joint activity.	°Exec. Dir. °Officers	°Staff time °Travel $	°1986-
	A3. Develop materials library staff can use to enhance administrators' understanding of academic libraries.	a. Prepare packets of materials that can be used by librarians in working with deans, provosts, presidents, and trustees. Packets will include role of library, library issues, and model program ideas.	°Appropriate ACRL Comm. or Task Force °Staff implement	°$ °Consultant °Staff time °Volunteer time	1986-89

*Starred objectives were identified as priority areas.

JSS 10/24
SP9

ACRL STRATEGIC PLAN

Goal: III. To promote and speak for the interests of academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
B. To monitor and speak out on government and private sector activities likely to affect academic and research librarianship, including legislation, and fiscal and political support at all levels.	*B1. Establish ACRL as the association with the authority to speak for the academic library profession on issues of importance to higher education and academic libraries.	a. Establish access to, or, if necessary, create resource files of information on people, bibliographic references and facts	°Appropriate ACRL or ALA member unit provide expertise °Staff arrange access or design and input with consultant help	°Volunteer °Computer °Staff time °Consultant °$	1986-90
	*B2 Strengthen effective membership efforts to affect and influence government and private sector activities, including legislation, funding, and the quality of higher education.	a. Create a packet of materials on how to influence legislators and legislation.	°ACRL Legislation Comm. advise and monitor °ALA Legislation Comm. advise °ALA Washington Office assist ACRL staff in design and implementation	°$ °Staff time °Member work	1987-89
		b. Assess the need to re-establish a 50-state legislative network.	°ACRL Legislation Comm. advise and monitor °ALA Washington Office assist ACRL staff in review	°$ °Staff time °Member work	1987-90

*Starred objectives were identified as priority areas.

JSS 86 10/24
SP10

ACRL STRATEGIC PLAN

Goal: III. To promote and speak for the interests of academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
B. To monitor and speak out on government and private sector activities likely to affect academic and research librarianship, including legislation, and fiscal and political support at all levels.	*B2 Strengthen effective membership efforts to affect and influence government and private sector activities, including legislation, funding, and the quality of higher education.	c. Create a checklist of ongoing legislation that comes up for re-review and separate list of current issues.	°ALA Washington Office assist in keeping current	°$ °Staff time	1986-88
	B3. Provide assistance for librarians seeking additional fiscal support for their libraries.	a. Collect and publicize examples of grant applications and budget proposals from successful libraries.	°Any member submit °Staff collect and store, publicize	°Volunteer time °Staff time °$	1986-
		b. Cooperate with LAMA or another group in presenting a fund-raising workshop.	°ACRL and LAMA staff	°Staff time °$:recover?	1987
C. To support and participate in the recruitment and retention of outstanding persons to the field of academic and research librarianship.	C1. Develop mechanisms to attract outstanding candidates to academic and research librarianship.	a. Prepare one recruitment brochure per year for a targeted audience such as library schools, undergraduates, paraprofessionals and high school and college counselors	°Membership Comm. prepare brochures °Staff produce and distribute	°Volunteer time °Staff time	1986-90

*Starred objectives were identified as priority areas.

JSS 10/24
SP11

ACRL STRATEGIC PLAN

Goal: III. To promote and speak for the interests of academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
C. To support and participate in the recruitment and retention of outstanding persons to the field of academic and research librarianship.	C1. Develop mechanisms to attract outstanding candidates to academic and research librarianship.	b. Encourage local chapters to develop recruiting programs aimed at high school and college students.	°Chapters Council adopt	°Volunteer time °Possible $ for development of model	1986
		c. Target research on the relationship of personnel standards to the recruitment, development, and retention of librarians.	°Research Comm.	°Volunteer time	1987-
	C2. Support the recruitment of members of underrepresented groups to academic librarianship.	a. Offer scholarships.	°Staff investigate cost °Staff prepare and distribute publicity °Board create comm. °Comm. select	°$ °Consultant °Staff time	1987-90
		b. Identify and cooperate with other organization pursuing the recruitment of minorities.	°Prof. Assoc. Liaison Comm. °Personnel Officers Discussion Group °Staff identify others °Promote in C&RL News	°Staff time °Volunteer time	1986-90
		c. Encourage libraries to hire minority student workers.	°Promote in C&RL News, etc.	°Staff time	1987-89

*Starred objectives were identified as priority areas.
JSS 10/24
SP12

Goal: III. To promote and speak for the interests of academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
C. To support and participate in the recruitment and retention of promising persons to the field of academic and research librarianship.	C2. Support the recruitment of members of underrepresented groups to academic librarianship.	d. Create an advisory group from our minority members to assist in recruiting minority students, specifically, to prepare and send information on librarianship as a career to minority students working in high schools, college, or public libraries.	°Board create comm. °Staff provide support	°$ °Staff time °Committee work	1987-89
		e. Encourage chapters to participate in local activities emphasizing career choices.	°Chapters Council	°Volunteer time °Possible $ for development of model program °Staff time	1987-
		f. Target research on the status of women and minorities in academic librarianship.	°Research Committee	°Volunteer time	1987-
	C3. Promote the adoption of personnel policies that enhance the status, professional development, and working conditions of academic librarians.	a. Collect and publish in C&RL News existing policies and practices on this topic.	°Staff °Personnel Officers Discussion Group °Academic Status Comm.	°Staff time	1986-
		b. Further disseminate such policies and practices.	°Editorial Board °Staff	°Staff time	1986-

*Starred objectives were identified as priority areas.

JSS 86 0510
SP13

Goal: III. To promote and speak for the interests of academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
D. To help shape library education programs in accord with the needs of academic and research librarianship.	D1. Develop an action plan describing how library schools might address the changing needs of academic/research libraries and librarians.	a. Review final report of Task Force on Library Education and adopt recommendations.	°Board instruct staff °Staff plan implementation, carry out	°Staff time °$	1987-
		b. Work with ARL in improving library school curricula.	°Joint Comm.	°Travel $ °Volunteer time	1987

Goal: IV. To promote study, research and publication relevant to academic and research librarianship.

A. To identify research topics and to encourage improvement in research skills.	*A1. Develop research priorities related to academic libraries and their role in higher education.	a. Publicize on an annual basis the list of priorities developed by the ACRL Research Comm.	°Research Comm. produce agenda °Staff publicize	°Committee work °Staff time	1987-88
		b. Commission at least one paper per year on topics so identified.	°Research Comm. advise staff °Staff implement	°$? °Committee work °Staff time	1987-90
	A2. Develop incentives or programs to encourage librarians to engage in research.	a. Encourage paid research leaves for librarians.	°Research Comm. recommend method °Staff implement	°$ °Staff time	1987-

*Starred objectives were identified as priority areas.

JSS 86 10/24
SP14

ACRL STRATEGIC PLAN

Goal: IV. To promote study, research, and publication relevant to academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
A. To identify research topics and to encourage improvement in research skills.	A2. Develop incentives or programs to encourage librarians to engage in research.	b. Provide a forum at the 1989 ACRL National Conference for work-in-progress.	°Research Comm. °Cincinnati Comm.	°Volunteer time	1989
		c. Offer the Research Clinic at various locations throughout the U.S., based on the work of the Research Development Comm. and Manual.	°Staff seek CLR support for manual °Consultant (D. Anderson) prepare manual °Staff arrange publication and implementation of clinics °Members provide local arrangements	°$ °Staff time °Consultant °Member assistance	1986-88
		d. Encourage chapters to use Chapters Special Programming funds to support programs based on members' research.	°Chapters Council °Research Comm. advise	°Volunteer time	1988-89
B. To support research projects, report works in progress and disseminate research results.	B1. Seek grant funds for the creation of research grants and for carrying out research projects.	a. Write proposals to seek funding for research projects.	°Research Comm. °Staff	°Volunteer time °Staff time	1987
		b. Get ALA approval for fundraising.	°Staff seek approval	°Staff time	1986-87
		c. Approach potential donors, funders.	°Member efforts °Staff follow-up	°Volunteer time °Staff time	1987-
C. To advance the professional knowledge of academic librarians through an effective publishing program.	C1. Explore electronic publishing possibilities for ACRL publications.	a. Identify appropriate technology for one publication.	°Staff discuss with possible vendors	°Staff time	1986-87

*Starred objectives were identified as priority areas.

Goal: IV. To promote study, research, and publication relevant to academic and research librarianship.

Subgoal	Objective	Strategies	Responsibility	Resources	Year
C. To advance the professional knowledge of academic librarians through an effective publishing program.	C1. Explore electronic publishing possibilities for ACRL publications.	b. Carry out cost/benefit study.	°Staff calculate costs, benefits with aid of consultant	°Consultant °Staff time	1986-
		c. Make and implement decision.	°B & F recommend °Publication Comm. Editorial Boards recommend °Board decide °Staff and consultant implement	°Consultant °Staff time °$ /implementation	1987-
	*C2. Review the ACRL Publications Program to ensure that it supports Association mission, goals, and objectives.	a. Prepare a complete list of all ACRL serial and nonserial publications.	°Staff prepare	°$ °Staff time	1986-87
		b. Prepare Publishing Plan for ACRL, including present and proposed policies and strategies.	°Editorial Boards °Publications Comm. advise °Staff prepare draft	°$ °Comm. effort °Staff time	1986-87
		c. Present a and b to Board for approval of implementation.	°Board approve °Staff implement	°$ °Staff time	1986-91
	C3. Publish Choice and BCL on a regular basis.		°Choice staff °BCL III staff	°Editorial Boards °Staff time °Contractors	1986-

*Starred objectives were identified as priority areas.

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SP16

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C. STRATEGIC MANAGEMENT DIRECTIONS

The achievement of the goals, subgoals, and objectives included in this plan depends on the existence of a stable and well-managed association. ACRL's strategic directions over the five years encompassed by this strategic plan include:

1. Positioning ACRL as the most significant American association of academic and research libraries, librarians, and librarianship: the association which represents them, speaks for them, asserts their interests, and assists them in reaching their goals.
2. Managing the financial resources of ACRL by relying on sound budgeting and accounting principles; including the building and maintaining of a reserve fund equal to at least 50 percent of the average annual expenditures over the three most recently completed years.*
3. Maintaining a dedicated and competent staff by depending on sound personnel practices, including careful selection, adequate training, participative management techniques, and opportunities for professional development.
4. Seeking new members through a variety of recruitment techniques, while extending efforts to retain present members, including regular assessments of member needs.
5. Supporting all elected and appointed officers in fulfilling their leadership roles, through carefully prepared programs of orientation and staff personal attention.
6. Working collaboratively with other ALA units for the good of librarianship as a whole.
7. Providing a Headquarters office as a communications center, information resource, and central meeting and work place.

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*The American Society of Association Executives recommends a reserve of one year's operating expenses. ALA is moving in this direction.

A. Implementation: An Overview

Implementation

Once the ACRL Board has approved the five-year plan, the Board will forward it to the Planning Committee and instruct the Committee to implement it. The charge of the Planning Committee was recently revised so that one of its primary responsibilities is now to implement, evaluate, and revise the Association's strategic plan. In the plan, the highest priority or critical objectives have been starred. This designation of high priority objectives will be helpful in the implementation process. The report also includes a timeline targeting a specific year for the implementation of each critical objective.

Evaluation and Revision

The Planning Committee is also responsible for the evaluation process, which means evaluating progess towards stated goals, objectives, and strategies in the plan. Within this hierarchy, the objectives and strategies are the levels which are the most specific and measurable. The Planning Committee will need to develop a schedule to evaluate, revise and extend the plan on a cyclical basis. The most desirable time frame for ACRL's plan is an important issue in terms of extension. This first plan covers five years, but because of the difficulties of projecting the future very far in advance, there are advantages to mid-range strategic plans which cover three years. The process of implementation will help to determine if five years is the most effective and manageable time frame for ACRL's plan.

Involvement of key units

There are other units and key individuals who play an important role in the planning process. The Executive Director participates in developing the strategic plan as an ex officio member of the Planning Committee. With her staff, she also drafts an annual operating plan which proposes an action plan for each strategy targeted for the year. These action plans identify needed resources and point out fiscal implications.

The Executive Director is also an ex officio member of the Budget and Finance Committee and serves as a link between the planning and budgeting processes. The Budget and Finance Committee deals with the fiscal implications of objectives and strategies. The budget is prepared based on the annual operating plan, which is reviewed in draft form by the Budget and Finance Committee. As a result of this process, the budget recommended by the Committee to the Board of Directors reflects the priorities identified in the strategic plan.

The Challenges Ahead

In summary, the success of a structured planning process depends upon the involvement and coordination of a number of ACRL units. During the development of the strategic plan, two issues were raised which are beyond the scope of the Task Force or any single unit and which the Board of Directors may wish to consider. The first issue is the ongoing need to coordinate ACRL planning with ALA planning and to explore how the implementation of ACRL's plan will mesh with ALA planning activities.

The second issue is how to evaluate the effectiveness of the strategic plan as a whole in terms of carrying out ACRL's mission. This evaluation issue is different from the Planning Committee's responsibility to measure progress towards individual goals and objectives. According to planner Wayne Lemburg the ideal strategic plan "...provides a unifying identity, sense of purpose, philosophy, and direction to an organization" (Wayne A. Lemburg, "Charting the Future through Strategic Planning," Association Management, October 1980, p. 152). As ACRL's plan is implemented, its leaders will want to find a means of evaluating it with this ideal in mind.

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B. TIMELINE FOR IMPLEMENTATION OF STRATEGIES

Objective	1986-87	1987-88	1988-89	1989-90	1990-91
I.A.1. Lower cost to participate in ACRL professional development activities.	Scholarships Large group workshop-	 - - - - - - - - -	 - - - - - - - - - -		
		Volume discounts Grant funding- -	 - - - - - - - - - -		
I.A.2. Expand regional opportunities		Chapters Special Programming Fund-	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
			National Conference		
	New regional program-	- - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
	Alternative medium- -	- - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
I.A.E. Increase section suppport	Section Special Programming Fund-	- - -	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
	Target special sections for development	-	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
	Subsidize preconference -	- - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
	Partially subsidize publication -	- - - - -	- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
I.A.4. Assess educational needs	Professional development needs assessment survey-		- - - - - -	- - - - - - - - - -	- - - - - - - - - -
I.A.5. Coordinate with other organizations on professional development	Establish links with other organizations-		- - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -
I.B.1. Review awards policies		Compare with others	Decide on new		

TIMELINE FOR IMPLEMENTATION OF STRATEGIES

Objective	1986-87	1987-88	1988-89	1989-90	1990-91
I.B.2. Review awards procedures		Compare with others	Banquet?		
I.C.1. Promote career information	Online database?	College library exchange	Placement Service at Natl. Conf.		
II. A. 1. Develop output & performance guidelines	Implement recommendations of Performance Measures Task Force				
II. A. 2. Increase dissemination of standards	Distribute to academic administrators, accrediting agencies, higher education associations. Write articles, nonlibrary publications				
II. A. 3. Increase librarians' understanding of accreditation	Develop package- - - Provide material to accrediting agencies-	 	 - - - - - - - - - - -	 -	
II. A. 4. Promote identification, collection, dissemination of statistics	Monitor government activity - - - - - - - Participate in national decisionmaking-	 Coordinate with other organizations, ALA *C&RL News* article on statistics gathering Play a role in defining data elements	- 	- -	- -

TIMELINE FOR IMPLEMENTATION OF STRATEGIES

Objective	1986-87	1987-88	1988-89	1989-90	1990-91
II. B. 1. Publicize Advisory Services	Report on questions, responses, seek assistance		- - -	- - -	- - -
II. D. 1. Publicize innovative activities	Encourage units to identify innovation		- - -	- - -	- - -
	Continue regular reports in C&RL News		- - -	- - -	- - -
II. E. 1. Help institutions serving minorities	Assess means				
		Implement program	- - -	- - -	- - -
III. A. 1. Create opportunities for interaction with other professionals	Sponsor joint programs with 2 associations		- - -	- - -	- - -
	Publish one article/year by nonlibrarian				
			Discount conference fees for targetted associations		
	Sponsor two forums with invited papers by nonlibrarians			- - -	- - -
	Provide financial support to librarians making presentations at nonlibrary meetings				- - -
III. A. 2. Develop new alliances with other professional associations	Visit at least 6 associations per year; set up one joint activity			- - -	- - -
III. A. 3. Develop materials for use with administrators	Prepare packets on library issues	- - -	- - -	- - -	- - -
	Assist with AAHE recruitment publication				

TIMELINE FOR IMPLEMENTATION OF STRATEGIES

Objective	1986-87	1987-88	1988-89	1989-90	1990-91
III. B. 1. Establish ACRL as the association with authority	Build or get access to resource files	- -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - -
III. B. 2. Strengthen membership efforts on legislation, funding		Create packet- - -			
		Re-establishing legislative network?		- - - - - - - - -	- - - - - - - - -
	Create checklist of legislation	- - - - -			
III. B. 3. Assist librarians to find added fiscal support	Collect & publicize sample grant applications and budget proposals			- - - - -	- - - - - - - - -
		Cooperate to present workshop- - -			
III. C. 1. Attract candidates of high quality	Recruitment brochure-	- - - - - - - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - -
	Chapter recruitment				
		Personnel standards research - -			
III. C. 2. Support recruitment of underrepresented groups		Offer scholarships			
	Cooperate with other organizations-	- - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - -
		Encourage hiring of minority students			
		Create advisory group-	- - - - - - - - -	- - - - - - - - -	
		Encourage chapter activity			
		Target research- -	- - - - - - - - -	- - - - - - - - -	
III. C. 3. Promote personnel policies enhancing status, etc.	Collect, publish in C&RL News existing policies and practices			- - - - -	- - - - - - - - -
	Further disseminate -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - -	- - - - - - - - -

TIMELINE FOR IMPLEMENTATION OF STRATEGIES

Objective	1986-87	1987-88	1988-89	1989-90	1990-91
III. D. 1. Develop action plan for library school assistance		Review and implement report of Task Force- - - - Work with ARL			
IV. A. 1. Develop research priorities		Publicize list of priorities developed by Research Committee Commission one paper per year- - - -	- - - - -	- - - - - - - - - -	- - - - - - - - -
IV. A. 2. Develop research incentives for librarians	Offer Research Clinic-	Encourage paid leaves- - - - - - - - - - - - - - - - - - -	Provide Forum for work-in-progress at National Conf. Encourage Chapters		
IV. B. 1. Seek grant funds	ALA approval	Write proposals Approach funders			
IV. C. 1. Explore electronic publishing	Identify appropriate technology- - - - - - Carry out cost-benefit study - - - - - - - - -	Make and implement decision - - - - -			
IV. C. 2. Review ACRL Publication Program	Prepare complete list Publishing Plan Present above to Board	and implement- - -	- - - - - - - - - - - -	- - - - - - - - - -	- - - - - - - - - -

C. Recommended changes to ACRL's Financial Policies Implicit in the Plan

It is important to note that the Plan implies certain financial policy changes, and that the Plan can only be adopted in full if these changes are made. The Task Force therefore calls these to the attention of the ACRL Board:

1. Reserve funds are used:

   - to increase support to sections
     - where targeted
     - through a special programming fund
     - through pre-Conferences

   - to increase support to chapters
     - through the special programming fund

   - to make continuing education more accessible
   - to publish certain items
   - to distribute standards free of charge
   - to recruit members of underrepresented groups (scholarships)
   - to develop incentive programs to encourage librarians to do research

2. Grant funds are used to:

   - help support desired programs
   - carry out special projects

3. Dues revenue supports services for all members, including:

   - recruitment and retention activities
   - committees
   - sections
   - chapters
   - discussion groups
   - advisory services
   - research and statistics projects
   - Jobline
   - some programs at Annual Conference

4. These are self-supporting:

   - serial publications
   - non-serial publications, with special exceptions
   - continuing education, with special exceptions
   - National Conferences
   - Pre-Conferences, with special exceptions

D. Development of the Annual Operating Plan

This is the proposed process for the development of an annual operating plan by staff and its approval by the Board. To add years to the Strategic Plan, another, separate process, dominated by member contributions, will be devised by the ACRL Planning Committee.

July	ACRL Budget & Finance, Planning, and Board of Directors approve mission, goals, and objectives for upcoming year.
August	Staff retreat - 1/2 day - to consider the following year (not the one beginning the next month, but the one after that) using the timelines in the Strategic Plan as a guide. Action planning takes place in broad terms.
September	During orientation of Vice-President/President Elect, planning process is described.
October	Executive Committee reviews draft action plan.
November	Staff drafts annual plan.
December	Staff drafts budget, based on annual plan draft. Budget distributed to Budget & Finance; annual plan draft goes to B&F, Planning, and Board.
January	At Midwinter, draft is discussed. Tie-in with budget is kept in mind. Budget & Finance, Planning report to Board regarding their reactions, modifications of draft annual plan. Staff works on modifications suggested at Midwinter, revises plan and budget.
February	Staff presents draft budget to ALA COPES.
April	Revised plan considered by ACRL Executive Committee.
May	Any additional revisions made.
June	Plan distributed
July	Approval by Board on recommendation of Executive Committee and Budget & Finance.

SUGGESTED FORMAT FOR ANNUAL PLAN

I. Mission Statement

II. Goals

III. Subgoals

IV. Objectives

V. Critical Objectives

VI. Strategies

VII. Action plan for each strategy targeted for the year
Clearly indicates deadlines, person(s) responsible, resources needed

VIII. Budget as an expression of this plan

E. Dissemination

Decisions about disseminating this plan will be made by the ACRL Board of Directors. The Task Force would like to make the following suggestions.

1. A complete copy of the Plan, as here presented, be deposited in the ERIC system.
2. An eye-catching printed brochure be prepared for broad distribution. This would briefly describe the planning process; would include mission, goals, and objectives; summarize the background papers and identify strategic management directions.
3. An article be prepared for C&RL News.

APPENDIX A MEMBER NEEDS REPORT

I. Membership Profile and Key Statistics

Table MNI contains some information about ACRL members and other academic librarians. Although there are more women than men among ACRL members, the proportion is lower than in the library profession as a whole. Members tend to have degrees in addition to their library masters; more typically a second masters degree, but -- in increasing numbers -- the Ph.D. Compared to other divisions of ALA, ACRL has a higher percentage of the total number of its target market in its membership. About 15% of the members attend national conferences of the Association. 69% of the members have belonged to ACRL for less than 10 years, 46% for less than 5. The typical member is in her thirties, works in public services in an ARL library, and has participated somewhat in ACRL activities. ACRL has about 8000 personal members and 1000 institutional members. This means that about 35% of all academic librarians belong to ACRL and about 32% of all academic libraries belong to ACRL.

Table MN2 shows a five-year history of division membership. Table MN3, the most current division membership figures, with comparisons to last year; Figure MNI shows a bar graph of division membership history, and Table MN4, ACRL personal membership by state.

ACRL members are also good attenders at ALA Annual and Midwinter conferences. In every case, from the Philadelphia conference in 1982, through the Dallas conference in 1984, a greater percentage of the attendees were ACRL members than are represented in ALA as a whole. In Philadelphia, 28.9% of the attendees were ACRL members; at the time only 25.9% of ALA members were ACRL members. In Los Angeles, these figures were 30.6 and 20.6; in Dallas, 29.8 and 21.2, and in Chicago, 29.3 and 23.2.

II. Member Needs Survey and President's Program

In the fall of 1984, a survey was distributed to a random sample of 600 ACRL members. A copy of the survey, with all responses included, is appended. (Attachment MN1)

At the Chicago Conference, 1985, members had the opportunity to participate in the gathering of information for the needs survey. They were asked to rank the ten items of highest agreement from the survey results in priority order and to discuss the means of accomplishing these goals. Figure MN2 shows the statements; Figure MN3 indicates the rankings. Table MN6 is a content analysis of the discussion.

III. Personnel Study Group Report Summary

The ACRL Academic and Research Library Personnel Study Group, which had broadly representative membership, reviewed aspects of ACRL's mission, goals, and objectives, dealing with personnel. It concluded that ACRL was not in a strong position to address upcoming personnel issues, commissioned a paper by Alan Veaner, and presented a report with recommendations in the areas of External Relationships (intensify efforts to work academic constituencies); Professional Standards and Research (on personnel standards); Staff Development; Education (graduate and continuing); and Recruitment (in general, and of minorities). The recommendations have been included in the Plan.

Table MN1

SPLAT
ACRL Membership Characteristics

Attribute	1 Rogers	2 King	3 Anderson	4 Membership Form
Age				
° 20-30	8%	no data	Average 44.2	no data
° 31-40	36%			
° 41-50	20%			
° 51-60	25%			
° 61+	10%			
Sex				
° M	37.5%	35%	44.7%	no data
° F	62.5%	65%	55.3%	
Degrees				
° 2-year degree	6%			no data
° 4-year degree	32%	2%		
° M.L.S.	88%	95%		
° Other grad. degree	39%	3%		
° Ph.D.	15%		11%	
° Other	9%			
Place of Employment				
° Community College	6%	no data	no data	all academic 85%
° 4-yr. liberal arts	15%			
° Comp. 4-yr.	11%			
° Research/Doc non ARL	16%			
° Research/Doc ARL	35%			
° Other	17%			
Type of work				
° Public Service	29%	no data	no data	37.3%
° Tech Services	11%			18.1%
° Collection Development	3%			9.7%
° Systems/Auto.	2%			2.2%
° Administration	28%			
° Library Education	2%			3.3%
° Other	9%			23.6%
° Combinations	16%			
Activity: Participation				
° Level 0	32%	no data	18%=Total # ldship. position in sample. may be inaccurate	no data
° Level 1	32%			
° Level 2	27%			
° Level 3	9%			

1. Sharon Rogers' Questionnaire for President's Program, 261 respondents.
2. King Research reported 1982
3. Dorothy Anderson JAL January 1985.
4. Back of ALA membership form.

Attribute	Rogers	King	Anderson	ALA Membership Form	Other ACRL Stats.
Type of responsibility					
° Director/Dean				20.9%	
° Assistant/Assoc. Director				9.9%	
° Department Head				26.4%	
° Supervisor				16.8%	
° Non-Supervisory				26.0%	
Years of membership					
° 0-5	46%				
° 6-10	23%				
° 11-15	11%				
° 16-20	9%				
° 20+	12%				
Positions in academic libs.	no data	21120	no data	no data	
Conference attendance		Projection from sample	Actual		
Boston	15	1071	1800		
Minneapolis	14	1036	1270		
Seattle	15	1200	1220		
Geographical Regions *					
North Atlantic	42.6%	33.7%			33%
Great Lakes	23.4%	22.3%			28%
Southeast	7.4%	20.8%			13%
West/Southwest	26/6%	23.1%			24%

* of those who belong to chapters.

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Table MN2

	1981	1982	1983	1984	1985
aasl	5405	5390	5302	5324	6447
acrl	9441	8789	8580 *	8835	9158
alta	1699	1720	1889	1588	1644
ascla	1953	1910	1545	1458	1428
alsc	3718	3710	3108	3016	3112
lita	4642	4957	5549	5430	4925
lama	4557	4564	4712	4080	4250
pla	4807	4987	5610	5571	5354
rasd	5018	5063	5126	4502	4661
rtsd	6351	6292	6464	5865	5922
yasd	2757	2855	2247	2103	2078

*Dues increase and section surcharge implemented

1986 DIVISION MEMBERSHIP AS OF 6/30/86 PAGE 2

	AASL	ACRL	ALTA	ASCLA	ALSC	LITA	LAMA	PLA	RASD	RTSD	YASD	TOTAL
PERSONAL - NEW												
PAID	707	654	183	61	302	186	194	441	242	234	167	3371
SPECIAL-FREE												
HONORARY FREE	1	1	1	1	1	1	1	1	1	1	1	11
TOTAL	708	655	184	62	303	187	195	442	243	235	168	3382
TOTAL 6/30/85	1527	607	186	71	230	234	213	307	245	261	92	3973
PERSONAL - RENEWALS												
PAID	3968	6944	1053	831	2092	3220	2983	3956	3091	4119	1212	33469
SPECIAL-FREE												
LIFE-FREE	169	599	21	52	112	120	234	267	235	332	122	2263
LIFE-DIVISION	5	37	1	3	6	17	18	11	22	23	4	147
CONT.-FREE	83	179	7	39	113	8	53	202	109	108	87	988
HONORARY FREE	18	20	18	19	18	20	20	15	19	19	18	204
TOTAL	4243	7779	1100	944	2341	3385	3308	4451	3476	4601	1443	37071
TOTAL 6/30/85	3859	7053	1088	940	2206	3566	3098	4132	3238	4418	1390	34988
PERSONAL - REINSTATES												
PAID	139	194	25	28	80	80	82	152	85	94	37	996
SPECIAL-FREE												
LIFE-FREE												
LIFE-DIVISION												
CONT.-FREE												
HONORARY FREE												
TOTAL	139	194	25	28	80	80	82	152	85	94	37	996
TOTAL PERSONL	5090	8628	1309	1034	2724	3652	3585	5045	3804	4930	1648	41449
TOTAL 6/30/85	5583	7867	1290	1034	2511	3892	3395	4541	3588	4779	1512	39992
ORGANIZATION - NEW												
PAID	105	44	10	10	22	24	21	30	24	25	31	346
FREE												
SPECIAL-FREE												
TOTAL	105	44	10	10	22	24	21	30	24	25	31	346
TOTAL 6/30/85	87	30	9	9	29	20	22	41	21	18	23	309
ORGANIZATION - RENEWALS												
PAID	669	1069	317	348	518	887	755	674	978	986	507	7708
FREE	1	1		1				1				4
SPECIAL-FREE												
TOTAL	670	1070	317	349	518	887	755	675	978	986	507	7712
TOTAL 6/30/85	637	1063	298	352	503	902	728	645	963	1009	491	7591
ORGANIZATION-REINSTATES												
PAID	13	17	4	5	9	12	11	9	11	10	8	109
FREE												
SPECIAL-FREE												
TOTAL	13	17	4	5	9	12	11	9	11	10	8	109
TOTAL 6/30/85	16	12	1	3	7	9	7	8	8	12	11	94
TOTAL ORGA.	788	1131	331	364	549	923	787	714	1013	1021	546	8167
TOTAL 6/30/85	740	1105	308	364	539	931	757	694	992	1039	525	7994
GRAND TOTAL	5878	9759	1640	1398	3273	4575	4372	5759	4817	5951	2194	49616
TOTAL 6/30/85	6323	8972	1598	1398	3050	4823	4152	5235	4580	5818	2037	47986

Table MN4

	APR	
	Psl.	Org.
AL	97	9
AK	18	1
AZ	107	6
AR	30	9
CA	848	45
CO	108	6
CT	159	15
DE	33	2
DC	112	9
FL	218	27
GA	165	17
HI	34	2
ID	17	4
IL	569	45
IN	255	16
IA	115	12
KS	117	8
KY	79	14
LA	107	14
ME	21	6
MD	220	20
MA	406	32
MI	298	16
MN	147	13
MS	41	7
MO	136	12
MT	33	5
NE	65	6
NV	31	2
NH	41	3
NJ	238	26
NM	48	5
NY	869	68
NC	212	20
ND	28	3
OH	345	31
OK	80	10
OR	86	8
PA	451	42
RI	72	10
SC	63	13
SD	27	5
TN	133	8
TX	386	34
UT	32	5
VT	33	2
VA	249	19
WA	161	15
WV	28	5
WI	172	12
WY	23	5
PR	20	7
GU	1	0
VI	3	1
CANADA	269	66
PUAS	1	
CANAL ZON	1	
TM	1	
OTHER	209	108
TOTAL	8868	911

Table MN5

Registrations Figures, ACRL CE courses
ALA Annual Conference 1981 through ALA Annual Conference, 1985

ALA Annual 1981—San Francisco

CE I	28
CE II	12
CE III	30
CE IV	7
4 courses	77 participants

ACRL Nat'l Conf. 1981—Minneapolis

CE 101	21
CE 102	10
CE 103	13
CE 201	7
CE 202	34
CE 301	13
CE 501	9
CE 502	11
8 courses	108 participants

ALA Annual 1982—Philadelphia

CE 101	30
CE 103	6
CE 104	29
CE 105	14
CE 201	9
CE 202	26
CE 501	15
CE 503	6
8 Courses	135 participants

ALA Mid-Winter 1983—San Antonio

CE 101	20
CE 104	10
CE 501	11
3 courses	41 participants

ALA Annual 1983—Los Angeles

CE 101	17
CE 103	12
CE 105	11
CE 106	15
CE 202	22
CE 503	9
6 courses	86 participants

ALA Mid Winter 1984—Washington

CE 101	16
CE 106	12
CE 107	17
CE 501	6
4 courses	51 participants

ACRL Nat'l Conf. 1984—Seattle

CE 107	28
CE 108	16
CE 109	15
CE 110	27
CE 201	15
CE 202	35
CE 205	19
CE 501	22
8 courses	184 participants

ALA Annual 1984 Dallas

CE 107	19
CE 111	19
CE 112	24
CE 202	13
CE 205	17
6 courses	106 participants

ALA Mid-Winter 1985 Washington

CE 101	9
CE 112	8
CE 205	12
CE 501	11
4 courses	40 participants

ALA Annual 1985--Chicago

CE 101	24
CE 107	18
CE 110a	12
CE 111	12
CE 201	7
CE 202	15
CE 205	10
CE 206	17
CE 501	9
9 courses	124 participants

TOATL # PARTICIPANTS = 952
TOTAL # COURSES
PRESENTED = 60
952 - 60 = 16
AVERAGE OF 16 PARTICIPANTS/COURSES

Registration Figures, ACRL CE Courses
ALA Annual Conference 1981 Through ALA Annual Conference 1986

ALA Mid Winter 1986-Chicago

CE 106	14
CE 108a	15
CE 112	15
CE 206	12
5 courses	56 participants

ALA Nat'l Conf. 1986-Baltimore

CE 101	22
CE 107	26
CE 108a	13
CE 113	24
CE 114	9
CE 202	15
CE 206	17
CE 301	18
CE 503	9
CE 504	9
CE 505	16
11 courses	178 participants

ALA Annual 1986-New York

CE 3000	23
CE 113	19
CE 114	9
CE 505	10
CE 506	
CE 507	11
	72

TOTAL # PARTICIPANTS= 1,202
TOTAL # COURSES
PRESENTED = 81

AVERAGE OF 15 PARTICIPANTS/COURSE

Table MN 6

STRATEGIC PLANNING TASK FORCE, ACRL

MEMBER NEEDS ANALYSIS - PART 2
ANALYSIS OF BRAINSTORMING ACTIVITY ON FIVE TOP-RANKED ACTIVITIES
PRESIDENT'S PROGRAM
JULY 8, 1985

51 tables each discussed the five top priority association activities. Ideas were grouped together to clarify trends.

I. PUBLICATIONS

Category	Specific suggestions	Total times mentioned
Clearinghouse of some kind	articles to be submitted online	1
	online bibliographic access to ACRL publications	1
	online data access (on-demand publication?)	1
	other	1
		4
Employment ads	July/August issue is not good; many jobs available at that time	1
Financing	costs are absurdly high	1
	look for outside support for journals	1
	monographs are too expensive	1
	support use of ALANET to make publications accessible	1
		4
Grants	seek grants for research and publication	1
	offer small ones to help members publish, prepare articles and monographs	1
		2
Make sure all interests are reflected	research libraries, too	1
	column on community and junior colleges in C&RL	1
	articles of general interest	1
	broaden base of articles	1
	use good chapter materials in association-wide publications	2
	have sections contribute as a way of strengthening them (and chapters)	1
	include small colleges and small libraries	1
	some for libraries, some for individuals	1
	aim at largest possible audience	1
	more on community & junior colleges	1
	encourage section publications	1
		12

I. PUBLICATIONS cont'd

Liaison-related	piggyback on faculty association publications	1
	encourage ACRL members to publish in other journals and fields	1
	recognize members' publications in C&RL News	1
		3
Maintain, continue publications	keep up the good work	9
	keep all we have	1
	continue the excellent job	1
		11
Monographs	publish more	2
	more small monographs on specific, narrow topics	3
	"occasional papers" on specific issues	1
	solicit scholarly publications in diverse areas	1
	annotated bibliographies on specific topics	1
	conference proceedings of small conferences	1
	specific kits/manuals on workshops	1
	operating manuals for cost accounting, performance measures, strategic planning	1
	ACRL handbook	1
	too expensive	1
	do a survey to further develop themes rising from C&RL	1
	make something like specific kits for different size libraries	1
		15
Books for College Libraries	update more frequently	2
	publish supplements	1
	publish online	1
		4
Conference Proceedings	continue free to attendees, especially printed	2
	publish as soon as possible	1
	allow longer lead time for juried conference papers	1
	improve quality	1
	index them	1
	on microfiche with hard copy abstracts	1
		7

I. PUBLICATIONS cont'd

Old vs. New	strengthen present, vs. start new	8
	survey members re: need for new publications	1
	be open to need for new publications	1
	be cautious in starting new ones	1
	perhaps expand	2
	new kinds: theme, jobs	1
	review publications for need of new ones, of discontinuing, of new formats	1
		15
Prizes	offer for excellence in publishing	1
	to attract better manuscripts	1
	to authors	1
		3
Promotion & Marketing	general	1
	monograph prices restrict marketing	1
	make purchase simpler: accept purchase order vs. cash w/order	1
		3
Quality	emphasize quality	4
	use qualified reviewers, referees	2
	use outside readers for critique of methodology	1
	monitor calibre	1
	maintain high standards	3
	maintain good educational staff	1
	improve editing	1
	edit statistics articles better (tables)	1
	attract better manuscripts	1
	offer prizes	1
	improve quality	3
	increase rigor of screening process	1
	improve quality of conference proceedings	1
	continue to upgrade quality of existing publications	1
		22
Encourage Research & Publication	awards	1
	recognition in C&RL News even if not library-related	1
	encourage 1st time authors	4
	promote adequate research leave support	4
	grants-in-aid	1

I. PUBLICATIONS cont'd

Encourage Research & Publication (cont'd)	encourage publication by ACRL members in collegial journals	1
	funding for	1
	research funds for writing	1
	special column for new reserchers	
	tie in with continuing education	1
	assist librarians to produce better articles, research, etc.	1
		16
Serials	do not proliferate	3
	don't change titles	1
	do not need RBML	1
	mix of research, how-to & how-not-to; practical & research	3
	less emphasis on statistics	1
	more opinion - philosophy	1
	cross - divisional news & publications	1
	use caution in establishing new ones	1
	give jobs top support even when $ tight	2
	theme journals	1
	book reviews late	1
	online publication of FJLS, Choice	1
		16
C&RL	increase size or frequency	1
	theme issues	1
	give authors feedback	1
	include collection on CJCL's	1
	greater currency	1
	too many articles by library school faculty - they're not on front line	1
	more practical articles to even it up	1
	analyze value: do a qualitative survey	1
	is there a sufficient number of prospect articles?	1
	most important publication, with Choice	1
	bigger print	1
		11
C&RL News	expand	2
	disseminate preliminary results of ongoing research	1
	use for surveys	1
	column on grant availability	1
	continue and strengthen research notes	1
	abstract section newsletter highlights here	1

I. PUBLICATION cont'd

C&RL News (cont'd)	consider the expanding role of C&RLN	1
	report chapter activities	1
		9
Choice	improve timeliness - especially science	2
	run full-fledged reviews of non-print materials	1
	foreign language coverage	1
	signed reviews good	1
	editorial control improved	1
	with C&RL, most important of our pubs.	1
	have online via ALANET	1
	continue non-print reviews	1
	add software reviews	1
	keep up good work	1
	expand multi-media materials; integrate with subject	1
		12
Newsletters	continue	2
	encourage, so they keep on	1
	do in clusters of sections w/overlap in interest	1
	for discussion groups	1
	enlarge to allow publication of substantial articles	1
	section "jobs" should have more support	1
	abstract highlights in C&RL News	1
	review funding priorities	1
		9
RBML	don't need	1
	good	1
	avoid proliferation of narrow subject specialties like rare books	1
		3
FJLS	have online via ALANET	1
Timeliness	improve - especially Choice	1
	speed up production	1
	make C&RL more current	1
	evaluate publication dates routinely	1
	book reviews late	1
		5

I. PUBLICATION cont'd

Miscellaneous/specific ideas	develop publications for faculty	1
	use to develop awareness regarding advisory services	2
	solicit more articles	1
	use electronic publication	3
	current contents service	1
	use to let members know what services are available & guidelines	1
	expand ALANET	1
		10

II. STANDARDS

Accrediting agencies	promote cooperation among	1
	link with them	8
	spend money on this?	1
	librarians on teams	5
	lobby more aggressively	2
	promote to them	4
	develop cooperatively with	1
	get them to incorporate ours in theirs	6
	get them to take us seriously	1
	input from them	1
	endorsement by	1
	do papers at their meetings?	1
	maintain & make available a list of "excellent libraries" for	1
		33
Coordination	coordination of standards	3
	with other ALA units	2
	with other schools & professional organizations;	4
	ARL especially	1
	with groups that carry weight with administration	1
	endorsement by others	1
		12
Develop Standards/Guidelines for:	2 year colleges	1
	library education for academic librarians	3
	units establish in their areas of expertise	3
	continuing education	2
	cost accounting standards	1
	research leave (prof. devel.)	1
	Machine Readable Files	1

II. STANDARDS cont'd

Member input		1
	hearings: seek broadly	2
	committees	
	needs survey	3
	representatives of sections	1
		7
Miscellaneous	mention library standards in university catalogs	1
	make more specific	1
	make stronger and supportive	2
	"atmosphere & secondary use be evaluated"	1
	be sure all ACRL interests represented	1
	"academic" (preferred) vs. "faculty" status	1
	locate standards for members	1
	need quantitative standards	1
		9
Promotion		7
	publicize successes	1
	publicize with administrators	2
	publicize outside library community	3
	article in Chronicle of Higher Eduation	2
	give speeches regarding standards	1
	publicize with legislators	2
	publicize availability	1
	course on importance of	1
		20
Publication of	put all together and disseminate as a group	1
	on floppies, microfiche	1
	free	1
	more frequently in C&RL News	1
		4
Purposes of	upgrade quality of service for all libraries	1
	give everybody a goal	1
	should be achievable; not impossibly high	1
	useful	1
		4
Research	to establish norms: base standards on these	3
	explore different approaches to measurement	1
	to define what's minimal and what is optimal	1
		5

II. STANDARDS cont'd

Develop Standards/Guidelines for: (cont'd)	planning process	2
	needs assessment tools	1
	priority setting	1
	A/V & software	1
	performance evaluation	3
	for these five priority items	1
	extended campus services	1
	output measures	3
	Bibliographic Instruction	1
	collection development (incorporate new technology)	
	salaries	2
	volume counts	1
	service	3
	terminology	1
	educational requirements	3
	new technology	1
	professional: non-professional ratio	1
	staffing criteria	2
	university level: quantitative standards	1
	specific disciplines	1
	branch campuses	1
	comparable worth	2
		46
Enforcement		3
Expand vs. limit	concentrate on areas not now covered	1
	there are too many; take care in choosing new areas	1
	present activities fine	1
	more would be counter-productive	1
		4
Implementation		1
	publicize where successful	1
	program at a conference on how standards are implemented	
	encourage ARL directors to apply them	2
	offer consultant/facilitators to help instructors revise & discuss	1
	course on how to use with administration	1
	"tip sheet how to use"	
	guidelines on	5
	strategies for	2
	survey present status	2
	find out how librarians use	2
		17

III. LIAISONS cont'd

"Infiltrate" other organizations (cont'd)	more communication with faculty members' associations	1
	encourage our members to give papers at other meetings	1
	reach out to others	1
	send our publications, brochures, etc. to others	1
	offer workshops at others' conferences to explain library importance to field	1
		43
Financial Assistance	encourage academic libraries to support staff travel to other meetings	3
	provide money for staff to attend and work with other associations	1
	encourage ACRL members (thru funding) to join other professional associations	2
	provide money for members to attend other conferences	2
	stipend for best paper in non-library journal	1
	seek joint grant support	1
	subsidize joint membership	1
	re-fund BI Liaison	1
	fund having experts in targeted organizations participate in ACRL programs	2
		14
Cooperative activities with other organizations	negotiate for reduced and special joint membership fees	3
	publish bibliographies in others' publications	1
	form coalitions on specific topics	1
	hold meetings back to back	1
	seek joint goals	1
	have ACRL President make overture to other presidents regarding working together - common interest	1
	approach others for joint workshops and conferences	1
	formal liaisons	1
	(multi-year)	1
	joint liaisons	1
	discipline - based liaison	2
	offer assistance with computerization and index production	1
	negotiate regarding institutional pricing of journals -	1
	or exchange of journals at member prices	2
	joint C.E., instructors, pre-conferences	3

II. STANDARDS cont'd

Updating		1
	reassess regularly	9
	schedule revisions	2
	evaluate	1
	more frequently	1
		14

III. LIAISONS

Government Liaisons	lobbying for aademic library needs	1
	fund travel of ACRL members to professional meetings to discuss financial/political impact of federal legislation on libraries	1
	more diplomatic contacts	1
		3
Open ACRL to others	encourage faculty to publish in library journals; solicit papers	2
	invite faculty to speak at ACRL conferences	1
	invite reps from other disciplines and organizations to ACRL conferences as speakers, discussion leaders	10
	sell ourselves	1
	more communication with faculty	1
	encourage organizational memberships by other organizations	1
	develop "affiliate organizational" membership	1
		17
"Infiltrate" other organizations		1
	encourage poster sessions by librarians at other meetings	1
	exhibit at other meetings	7
	send formal ACRL reps to other meetings	5
	get institutional membership in other organizations	2
	encourage our members to join and be active in other organizations	4
	encourage our members to publish in other journals	11
	make high level initial contacts	1
	identify their goals and give better service	1
	identify appropriate committees there, or help establish	1
	supply speakers and consultants to other organizations, especially officers	4

III. LIAISONS cont'd

Cooperative activities with other organizations (cont'd)	joint committees	1
	joint articles and publications	2
	joint conferences	3
		27
Specific organizations for liaisons	AAUP	3
	ARLIS	1
	College Art Association	1
	MLA	1
	AACJC	1
	AAC	1
	AAHE	1
	AALL	1
	American Association of Historians	1
	other library organizations too	1
	accreditating bodies (regional)	5
	and subject-based	1
	disciplinary groups	1
	administrative groups	1
	database groups	1
	draw up a list of target organizations "mutually-beneficial"	2
		23
Information	report on others' activities	1
	in Chronicle of Higher Education	1
	educate other groups in mutual concerns, e.g., control of science publications	1
	require liaisons to report back via ACRL publications	1
	outreach thru publications	1
	publicize scholarly activities and publications of ACRL members	1
		6
Program activity	develop programs that can be presented at other professional conferences	1
	repeat successful and appropriate programs	1
	co-sponsor CE activities and institutes	3
	identify common concerns	1
	work on legislative concerns in common	1
	exchange visits by ACRL leaders and other associations	1
	joint activities at regional level	1
		9
Local activity	provide help to local libraries to link at their level	1

III. LIAISONS cont'd

Local activity (cont'd)	local campuses should encourage and fund section chairs to go to subject professional associations conferences	1
	crossover meetings by local chapters and local academic organizations	1
		3
Identify and strengthen existing links		1
	find out what organizations our members belong to; use these links	3
	use ALA membership form to do this	1
	identify goals of other organizations so as to give better service	1
	use activity sections as liaisons with disciplines	3
	(develop guidelines to help)	
	start with associations where ACRL has been successful, publish conference schedules, encourage librarians to submit papers and attend	1
		10
Other	encourage recruitment of scientists	1
	be careful not to duplicate work of other liaison committees	1
	increase visibility	1
	encourage recognition of bibliographies by other associations	1
	publish a directory of librarians with interdisciplinary grant-writing experience	1
	use library technology to link into professional groups and their interests	1
	librarians should take courses in discipline areas	1
	broaden and deepen range of contacts	1
	mix with booksellers...	1
		9

IV. CONTINUING EDUCATION

Subject or content	more variety	7
	more in-depth (practical)	5
	career development	1
	fee-based services	1
	preservation	1
	solicit member ideas	9
	role of faculty member	1
	program for paraprofessionals	1
	up-to-date library development	3

IV. CONTINUING EDUCATION cont'd

Subject or content (cont'd)	interdisciplinary programming	1
	automation (hardware & software)	1
	procedures for online library services	1
	strategic planning (in & outside library field)	1
	not have same workshops year after year	1
	selecting integrated systems	1
	expand present programs	5
	how to influence legislatures	2
	how to terminate non-productive staff	1
	how to deal with problem employees	1
	salary and contract negotiation	1
	cost accounting	1
	teach politics of academic life to newcomers	1
	clarify levels	1
	training in research methodology	3
	encourage mentoring	1
	online catalog & reference	1
	governance and management patterns in libraries	1
	preparing staff for automation	1
	leadership	1
	library reorganization	1
	emphasis problems and procedures	1
	repeat research conference offered at annual in as many locations as possible	1
	oral panel presentations	1
		60
Instructors	quality for regional	1
	allow state people to give workshops	1
	train at Mid-winter	1
	train trainer for regional workshops	5
	greater variety	1
	develop apprentice program	1
	library faculty for evening and weekends	1
	national bank of talent to offer CE	1
	develop regional roster of trainers/CE	1
	knowledgeable ones please	1
		14
Alternative Delivery Systems	video courses	15
	satellites	7
	correspondence courses	2
	literature review for informal CE of each	1
	self-directed instruction for home use	2
	explore formats	1
	explore cheaper formats	1

IV. CONTINUING EDUCATION cont'd

Alternative Delivery Systems (cont'd)	televise (live across country)	1
	use C&RL News to share information	1
	video cassette	1
		32
Links with other organizations or academia	schedule concurrently with other organizations	4
	join with other ALA divisions	2
	library schools	6
	state library associations	1
	avoid competion with other divisions	1
	with professors to let them know what state of the art is	1
		13
Location	regional	30
	increase accessibility local	26
	resources for state chapters	12
	less emphasis on national	2
	smaller cities	1
	designate certain people as regional resource people	1
	pre-conference state association mtgs.	1
	hold in less expensive locations	1
	sponsor sessions that would involve entire staff at library site	1
	transportable CE	1
	state chapters should be encouraged to develop programs	1
		77
Financial and Marketing or Other Resources	more subsidy--give scholarships	5
	control costs	2
	seek 3rd party support	1
	1-day workshops at reasonable prices	3
	approach commercial vendors for money time staff	3
	lower prices	9
	group prices	1
	cost recovery for members	1
	co-fund with chapters	1
	chapters promote CE	1
	share slush fund for local programming	1
	incentives or assistance for further graduate work	1
	source of funds information	1
	promote with publications	1
	fund travel of ACRL staff to chapter meetings	1
	keep costs at break even (no profit)	1
	reduced rate for local chapters	1

IV. CONTINUING EDUCATION cont'd

Financial and Marketing or Other Resources (cont'd)	subsidize costs	1
	use fewer people for program -- bring down cost	1
	provide grants for CE courses	1
	ACRL set aside fund to offer national programs locally (possibly use dues)	1
	increase stipend to chapters for local CE	1
		25
Miscellaneous	protect poster sessions for broad participation	1
	accreditation and standards for CE	1
	abolish minimum of 12 participants	1
	increase information on CE resources	1
	act as a clearinghouse	4
	designate people as resource people in region	1
	promote publications list	1
	limit enrollment to small groups	1
	"package" programs presented at annual conference by ACRL committees and take on road	1
	evening programs	1
	credit for CE thru library schools	1
	monitor programs	1
	hold other than at conference	1
	national database resource guide	1
	send out cassettes with tasks to accomplish before CE courses	1
		18

V. CHAPTERS

Awards	establish an award for chapters	1
Financial aspects	joint dues for chapter and national as a package deal	1
	increase amounts allocated to chapters	14
	be equitable regarding number of members in a state	1
	get grant funding	1
	give chapters money to give out to individuals to do research and projects	1
	maintain support	2
	shared "slush" fund for regional programs	1

V. CHAPTERS

Financial aspects (cont'd)	how will support at state/local level affect national support	1
	increase dues for incorporated services	1
	shorten time for grant request	1
	find a sponsor to help establish a support system	1
	fund a regional meeting	1
	underwrite program development	1
	don't spend all on newsletters	1
	give chapters money for their officers to travel to conferences for selves and junior members	1
	participate in CE	
	get leadership training	
	fund publications	
	support chapter programs	1
	help support chapter programs	1
	consider a salary-related dues schedule	
	explore problems of differing fiscal years	1
		33
Programming	staff assist chapters more	1
	exchange program ideas among chapters; encourage this; set up a network	4
	establish a programs "clearinghouse" for chapters	2
	let chapters influence national programming more	3
	bring more CE (co-sponsor?) programs to local levels	16
	encourage variety in programs including technical services, publication services	1
	expand speakers program	6
	encourage timely programs	1
	videotape and duplicate programs, e.g., on candidates for national offices	1
	emphasize programs	1
	regional and state conferences should be promoted	1
	prepare conference-planning kits with suggestions for topics, lists of speakers	1
	assist small chapters with good programs thru speakers bureau, etc.	1
	be sure chapters are involved in regional CE programs	1
		40

V. CHAPTERS cont'd

Promotion	more in C&RL News: publicize, report meetings	6
	advertise and promote local chapters	4
	put out newsletters for chapters	1
	publicize benefits of having a local chapter	3
	get more visibility at the local level	1
	exchange communications	1
	publish a list of chapters	1
	do more for chapters, then publicize it	2
		19
Recruitment	make available lists of national members for recruitment at local level	1
	staff help extend chapter participation	1
	get new people in	1
		3
State/Regional Association relations	clarify relationship of chapters and state/regional associations	1
	should not be necessary to belong to state association to be an ACRL chapter member	1
	ACRL should work better with state chapter	1
	help chapters organize regional coalitions	1
	don't compete with them	1
		5
New chapters	establish more	4
	help (guidelines, etc.) in establishment of new ones	2
	a conference on how to establish a chapter	1
	a kit on how to establish a chapter for states that don't have them	1
	"seed" individuals as a way to encourage more chapters	1
	stimulate development of chapters in areas where none exist	1
		10
Improve relations with national organizations		2
	improve structure of representation at national level	1
	clarify relationship between national ACRL and non-ACRL members who are chapter members	2
	make national more visible at local level	5

V. CHAPTERS cont'd

Improve relations with national organizations (cont'd)	encourage chapter people to join national	1
	important to have good communication between ACRL staff and chapter officers	1
	increase support from ACRL staff and officers	2
		14
Miscellaneous	encourage special interest groups at local level	1
	leadership training for chapter leaders	2
	use chapters as training ground for ACRL officers	1
	stress local purpose	1
	provide assistance to help upgrade chapter local talent	1
	joint chapter activity should be encouraged	3
	focus efforts here	2
	have student chapters	1
	have JMRT at local level	1
	very important, especially in remote parts of U.S.	1
	chapters should reach out to new members	1
	staff and/or officers do a brainstorming tour around country	1
	create Task Force to investigate ways to give chapters a higher priority	1
	have meetings at ALA conferences for chapter officers	1
	help states too small to have chapters	1
	use chapters to recruit members for national	1
	survey chapter members on needs	1
	establish means for providing consultative assistance and financial assistance for worldwide chapter activities	1
		22

Figure MNI

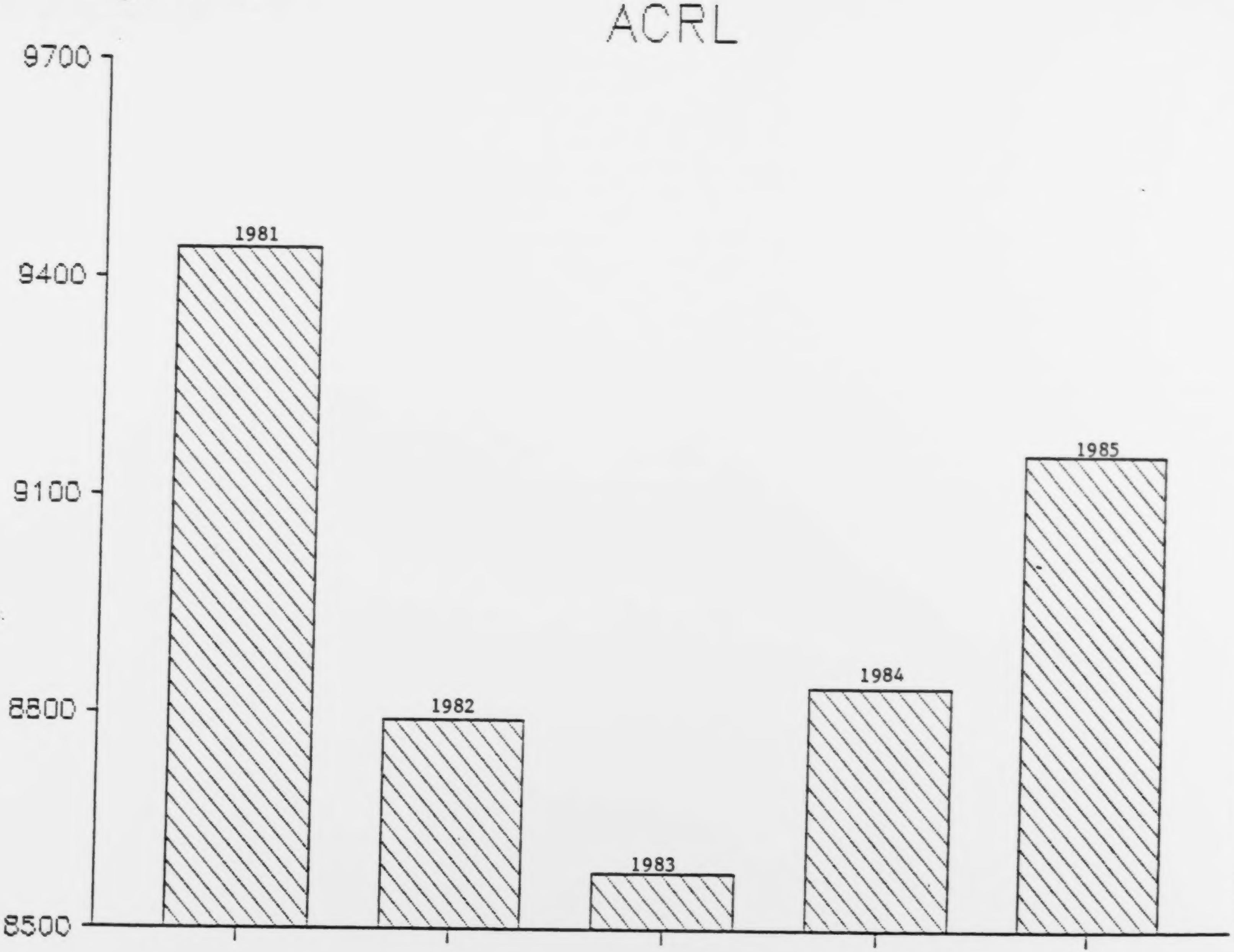


Figure MN2 STATEMENTS FOR PRIORITY SETTING

Rank

____ 1. ACRL continuing education programs should be expanded so that academic/research librarians may learn new skills and keep old skills current.

____ 2. ACRL should support state and regional chapters in order to encourage a sense of professional identity and peer reinforcement.

____ 3. ACRL should develop and promote vigorously standards and guidelines for academic libraries (such as personnel, collections, faculty status).

____ 4. ACRL should strengthen and better publicize the advisory services that it provides to libraries and academic institutions (e.g., recommendations for consultants, information on what other libraries are doing).

____ 5. ACRL should take a more active role in speaking out on government activities including legislation having a potential impact on academic and research librarianship.

____ 6. ACRL should monitor and help shape library education programs in accordance with the needs of academic and research librarianship.

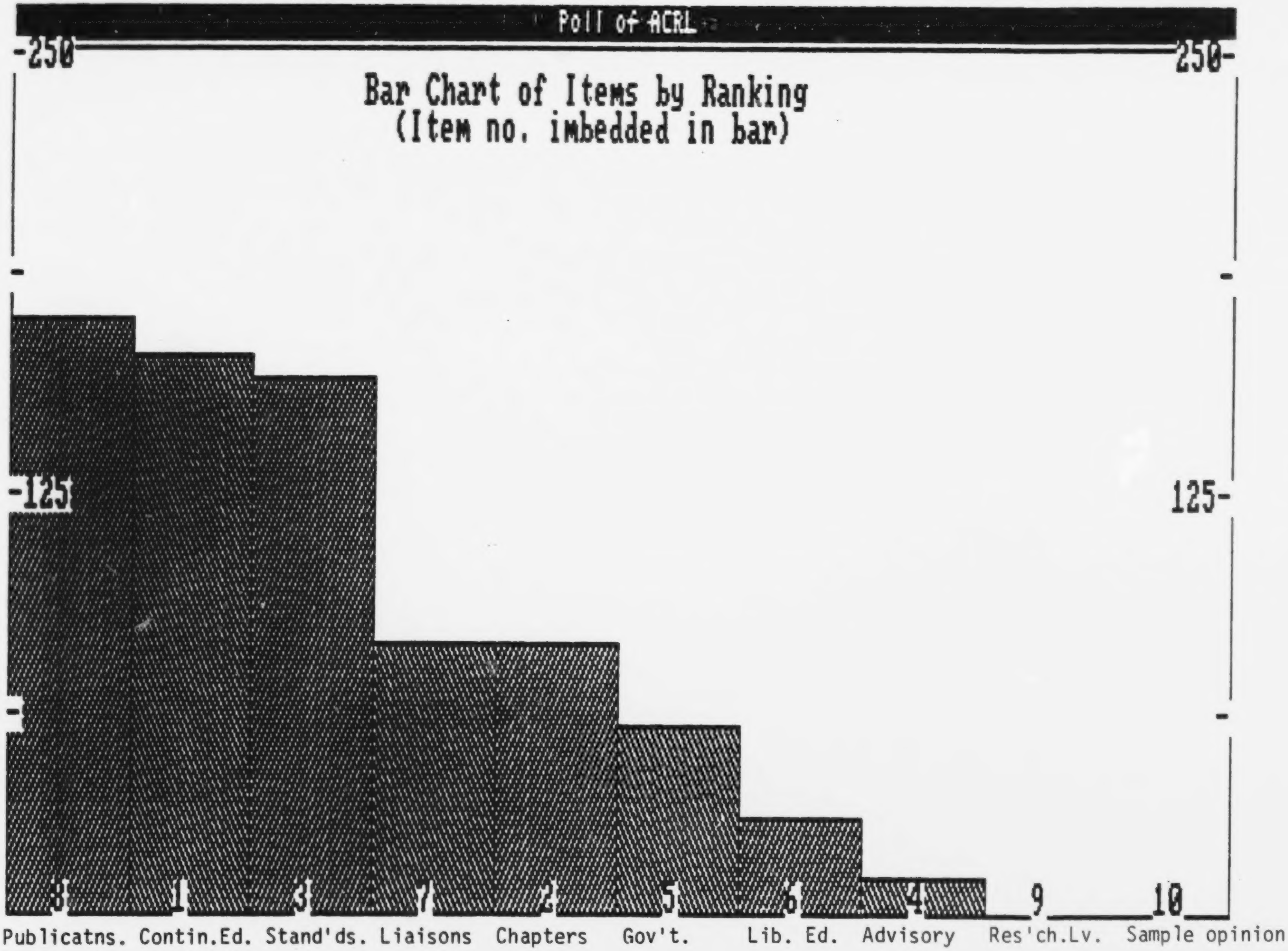
____ 7. ACRL should strengthen its alliances with other professional and scholarly organizations, thus increasing public awareness of the role of academic and research libraries in the higher education community (e.g., American Council on Education; American Association for the Advancement of Science; American Historical Association).

____ 8. ACRL should continue to sponsor publications (e.g., continuing education syllabi, conference proceedings, books, journals).

____ 9. ACRL should encourage research leave for academic librarians.

____ 10. ACRL should sample member opinion quickly and reliably for such things as program evaluation, planning, setting priorities.

Figure MN 3


Poll of ACRL
-250
250-
Bar Chart of Items by Ranking
(Item no. imbedded in bar)
-125
125-
8
1
3
7
2
5
6
4
9
10
Publicatns.
Contin.Ed.
Stand'ds.
Liaisons
Chapters
Gov't.
Lib. Ed.
Advisory
Res'ch.Lv.
Sample opinion

Attachment MN1

ACRL
ASSOCIATION OF COLLEGE AND RESEARCH LIBRARIES
A DIVISION OF THE AMERICAN LIBRARY ASSOCIATION
50 EAST HURON STREET • CHICAGO, ILLINOIS 60611 • (312) 944-6780

TO: 600 Selected ACRL Members

FROM: Sharon J. Rogers
ACRL President, 1984-85
Sharon J. Rogers

SUBJ: Priorities for ACRL

ACRL is a dynamic, growing professional organization. ACRL can provide many services for its members -- but it can't do everything. ACRL needs your help to determine what its priorities should be.

You are one of the 600 ACRL members who has been asked to contribute about one hour of your time to assess activities that are or could be supported by ACRL. The statements in the enclosed questionnaire are taken from the "Activity Model for 1990" which was adopted by the Board in 1982. (You may read the complete Activity Model in the May 1982 C&RL News, pp. 164-169). For each possible ACRL initiative, you are asked to respond to two questions:

- Is this something ACRL can do?
- Is this something you want ACRL to do?

ACRL members and their ideas about supporting academic librarianship will be the 1985 ACRL President's Program at the annual meeting in Chicago as we present the summary and analysis of your responses to this survey. Participants in the 1985 President's Program then will take your opinions, discuss and debate alternatives, and build a consensus on future priorities for ACRL. The final results will be presented to the assembled participants (if our computers collate it all properly and immediately) and to the second Board meeting for action by the ACRL Board. The results will also be published in C&RL News next summer.

Continuing information about the 1985 President's Program will appear in C&RL News. The September, 1984 issue outlines the basic plan on pp. 401-402.

Please accept my sincere thanks for making this contribution to ACRL and the 1985 President's Program. The questionnaire should be returned immediately, but no later than November 2.

DIRECTIONS

The following rankings are to be used when answering questions. Each question will be ranked on two dimensions:

- Feasibility/Practicality: can ACRL do this (or continue to do this, if applicable)?
- Preference for Implementation (i.e., Desirability): do I want ACRL to undertake (or continue) this task?

Within each dimension are 5 possible response categories. On the right-hand side of each question, please circle the number in each category (i.e., Feasibility and Desirability) which reflects your opinion.

FEASIBILITY/ PRACTICALITY		PREFERENCE FOR IMPLEMENTATION (DESIRABILITY)	
Definitely Feasible	1	Very Desirable	1
Possibly Feasible	2	Desirable	2
Possibly Not Feasible	3	Undesirable	3
Definitely Not Feasible	4	Very Undesirable	4
No Opinion/ Don't Know	5	No Opinion/Don't Know	5

FOR OFFICE
USE ONLY ☐ ☐ ☐ (1-3)

The following set of questions pertains to ACRL's goal of contributing to the total professional development of academic and research librarians.

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• Continuing education programs should be encouraged and expanded in order to allow academic and research librarians to learn new skills and update competencies.		160	64	11	15	2	175	60	9	9	2	(4-5)
	%:	64	25	4	6	1	69	24	4	4	1	
• In place of Continuing Education programs, and/or in addition to them, the number of articles appearing in the *News* which deal with the state of the art of academic librarianship should be expanded.		127	86	12	21	7	87	109	8	37	15	(6-7)
	%:	50	34	5	8	3	34	43	3	14	6	
• ACRL should increase and expand the publication of reports which advance professional knowledge. Examples of such publications include: Conference proceedings, *Evaluating Bibliographic Instruction* and *Online Bibliographic Database Searching in College Libraries*.		122	97	16	18	0	122	104	10	14	4	(8-9)
	%:	48	38	6	7	0	48	41	4	6	2	
• The *News* should summarize articles from journals like the *Chronicle* and the *Journal of Higher Education* so that academic and research librarians can remain informed of developments in the profession, and in higher education.		96	91	18	40	9	76	64	17	63	37	(10-11)
	%:	38	36	7	16	3	30	25	7	25	14	
• In place of educational journal abstracts, or in addition to them, *College and Research Libraries* should include a current awareness column.		115	101	16	14	7	90	105	21	27	12	(12-13)
	%:	45	40	6	6	3	35	41	8	11	5	

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• Academic and research librarians should have more opportunities (i.e., beyond the establishment of professional standards) to participate in determining the future of the profession.		41	98	33	64	11	101	94	29	20	7	(14-15)
	%:	17	40	13	26	4	40	37	12	8	3	
• ACRL chapters should encourage a sense of professional identity and peer reinforcement so that those members unable to attend separate national conferences are not alienated.		76	97	22	50	6	134	81	23	21	6	(16-17)
	%:	30	39	9	20	2	52	32	9	5	2	
• Public relations mechanisms which promote professional and peer identity, such as the Bibliographic Instruction Liaison Project, should be encouraged.		71	112	37	24	5	83	96	37	26	10	(18-19)
	%:	28	45	15	10	2	33	38	15	10	4	
• Career counseling and placement for academic and research librarianship should be strengthened by the following (please answer each entry):												
a. increasing the information available on international job exchanges.		73	113	25	34	6	72	104	31	37	9	(20-21)
	%:	29	45	10	14	2	28	41	12	15	4	
b. offering more career counseling courses within the Continuing Education program.		58	120	26	39	8	56	111	30	41	16	(22-23)
	%:	23	48	10	16	3	22	44	12	16	6	
c. providing chapter level career counseling.		39	97	32	69	11	59	98	34	47	13	(24-25)
	%:	16	39	13	28	4	24	39	14	19	5	

The following set of questions pertain to ACRL's goal of improving service capabilities of academic and research libraries.

		1	2	3	4	5	1	2	3	4	5	
• ACRL needs to vigorously promote standards and guidelines for personnel, collections, references, etc.		131	80	17	21	3	133	79	15	19	7	(26-27)
	%:	52	32	7	8	1	53	31	6	8	3	

		FEASIBILITY					DESIRABILITY					
• ACRL should strengthen and better publicize its advisory services that are provided to libraries and academic institutions.		1	2	3	4	5	1	2	3	4	5	(28-29)
		114	92	14	17	5	130	86	17	10	3	
	%:	47	38	6	7	2	53	35	7	4	1	
• Innovation in academic and research library services should continue to be rewarded through such vehicles as new workshops and special awards.		1	2	3	4	5	1	2	3	4	5	(30-31)
		86	109	13	31	4	99	110	15	18	3	
	%:	35	45	5	13	2	40	45	6	7	1	
• Fiscal and political support (including support of appropriate legislation) for academic and research libraries needs to be strengthened		1	2	3	4	5	1	2	3	4	5	(32-33)
		94	92	16	36	8	146	59	16	21	6	
	%:	38	37	7	15	3	59	24	6	8	2	
• ACRL should develop a stronger working relationship with the ALA Washington Office to help strengthen fiscal and political support.		1	2	3	4	5	1	2	3	4	5	(34-35)
		97	91	32	20	7	122	66	34	19	8	
	%:	39	37	13	8	3	49	27	14	18	3	

The following set of questions refers to ACRL's goal of promoting and speaking for the interests of academic and research librarianship.

• Projects that further the recognition of librarians as full academic partners (e.g., the Bibliographic Instructional Liaison Project) should be undertaken more frequently and vigorously.		1	2	3	4	5	1	2	3	4	5	(36-37)
		75	115	17	32	5	112	84	21	21	9	
	%:	31	47	7	13	2	45	34	9	9	4	
• ACRL should strive to increase public awareness of the role of academic and research libraries.		1	2	3	4	5	1	2	3	4	5	(38-39)
		116	92	12	22	4	150	67	11	16	4	
	%:	47	37	5	9	2	60	27	4	6	2	

- The following activities should be a part of an ACRL comprehensive strategy study aimed at increasing visibility, spokesmanship and representation:

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
a. strengthen alliances with other professional and scholarly organizations (e.g., the American Association for the Advancement of Science, American Council on Education, etc.)		88	108	20	26	6	133	81	17	13	8	(58-59)
	%:	35	44	8	10	2	53	32	7	5	3	
b. establish joint committees with other professional organizations.		68	107	25	41	6	111	87	27	20	6	(60-61)
	%:	28	43	10	17	2	44	35	11	8	2	
c. encourage ACRL members to attend meetings of other professional associations.		92	107	17	23	7	126	81	21	13	9	(62-63)
	%:	37	43	7	9	3	50	32	8	5	4	

The following set of questions refer to ACRL's goal of promoting study and research relevant to academic and research librarianship.

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• Publications (e.g., Continuing Education syllabi, conference proceedings, books, journals) should continue to be sponsored by ACRL.		128	94	12	7	7	142	90	15	4	2	(64-65)
	%:	51	38	5	3	3	56	36	6	2	1	
• National conferences provide an acceptable forum for the discussion and dissemination of research results.		101	96	16	24	7	90	105	16	23	13	(66-67)
	%:	41	39	7	10	3	36	43	6	9	5	
• Vehicles other than the National Conferences are needed in order to discuss and disseminate research results.		73	100	33	26	11	100	84	34	22	9	(68-69)
	%:	30	41	14	11	4	40	34	14	9	4	

- Awareness of the role of academic and research libraries should be enhanced by ACRL among such groups as:

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
a. regional accrediting agencies.		86	103	18	31	6	123	82	19	20	3	(40-41)
	%:	35	42	7	13	2	50	33	8	8	1	
b. government agencies.		71	102	20	37	14	111	85	19	16	15	(42-43)
	%:	29	42	8	15	6	45	35	8	7	6	
c. scholarly and professional organizations.		117	98	7	17	7	150	78	8	8	4	(44-45)
	%:	47	40	3	7	3	60	31	3	3	2	
d. other segments of the library profession.		89	91	22	33	6	84	90	27	35	7	(46-47)
	%:	37	38	9	14	2	35	37	11	14	3	

- In an effort to support and participate in the recruitment of promising persons to the library field, ACRL should:

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
a. develop and disseminate its own literature on academic librarianship.		83	104	13	35	7	80	95	16	41	13	(48-49)
	%:	34	43	5	14	3	33	39	7	17	5	
b. work locally on recruitment of graduate students.		35	94	25	76	11	56	85	36	50	20	(50-51)
		15	39	10	31	5	23	34	15	20	8	
c. sponsor graduate school fellowships.		56	102	25	44	14	88	90	25	25	17	(52-53)
	%:	23	42	10	18	6	36	37	10	10	7	

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• ACRL should monitor and help shape library education programs in accordance with the needs of academic and research librarianship.		70	102	16	46	11	123	77	18	18	10	(54-55)
	%:	29	42	6	19	4	50	31	7	7	4	
• ACRL should take a more active role in speaking out on government activities of potential impact upon academic and research librarianship.		106	98	5	29	8	130	76	11	23	9	(56-57)
	%:	43	40	2	12	3	52	31	4	9	4	

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• The need for research should be more strongly publicized and promoted.		85	107	19	30	7	87	99	25	29	11	(70-71)
	%:	34	43	8	12	3	35	39	10	12	4	
• ACRL needs to encourage improvements in research skills.		82	112	16	30	5	114	95	14	24	4	(72-73)
	%:	33	46	7	12	2	45	38	6	10	2	
• Continuing Education courses in research skills should be offered more often to improve research skills.		77	114	17	29	7	96	100	20	28	6	(74-75) 76-80 B1
	%:	32	47	7	12	3	33	40	8	11	2	
• ACRL should enhance its efforts at identifying and publicizing issues and topics requiring study and research.		96	113	13	19	4	115	106	14	14	2	(4-5)
	%:	39	46	5	8	2	46	42	6	6	1	
• ACRL should strengthen its efforts at securing funding for and commissioning of research projects through such means as the Institute for Scientific Information ACRL Fellowships or the Statistics Task Force.		79	113	23	23	6	119	92	21	8	10	(6-7)
	%:	32	46	9	9	2	48	37	8	3	4	
• Research leaves for academic and research librarians should be encouraged.		100	82	16	43	8	161	71	11	7	4	(8-9)
	%:	40	33	6	17	3	63	28	4	3	2	
• ACRL should actively encourage, endorse and disseminate (through special editorial columns in its' journals) the results of relevant research undertaken *outside* the library profession.		95	97	20	28	6	121	82	19	20	8	(10-11)
	%:	39	39	8	11	2	48	33	8	8	3	
• A clearinghouse for relevant research in progress should be established.		63	91	30	53	10	87	93	30	31	10	(12-13)
		26	37	12	21	4	35	37	12	12	4	

The following set of questions pertains to some additional ACRL activities in the areas of membership and administration.

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• The format of National conferences (e.g., structure, frequency, length, and location) should be studied for possible modifications.		100	98	27	13	8	91	87	36	26	10	(14-15)
	%:	41	40	11	5	3	36	35	14	10	4	
• Alternative modes of conference and workshop delivery (e.g., videotapes, recordings, decentralization) should be studied.		93	107	19	22	5	89	97	24	35	6	(16-17)
	%:	38	43	8	9	2	35	39	10	14	2	
• ACRL should encourage the establishment of more discussion groups, encompassing a wider range of topics.		77	93	34	26	12	70	80	41	45	13	(18-19)
	%:	32	38	14	11	5	28	32	16	18	5	
• Market analyses of the needs of conferences and workshops should be undertaken.		47	103	41	39	11	46	85	52	47	15	(20-21)
	%:	20	43	17	16	5	19	35	21	19	6	
• ACRL should consider new formats for *College and Research Libraries*, such as:												
a. more pages		40	76	41	65	15	18	58	43	97	30	(22-23)
	%:	17	32	17	27	6	7	24	17	39	12	
b. increased frequency		29	60	37	84	27	7	35	40	118	47	(24-25)
	%:	12	25	16	35	11	3	14	16	48	19	
c. monographic supplements		44	90	42	46	15	37	84	43	54	29	(26-27)
	%:	19	38	18	19	6	15	34	17	22	12	
d. sections for discussion and research reports		58	121	23	26	10	55	118	27	30	18	(28-29)
	%:	24	51	10	11	4	22	48	11	12	7	
• Consideration should be given to alternate modes for supplementary publishing (e.g., microfilm, single copy/on demand, online, etc.).		51	86	40	47	16	39	76	43	58	31	(30-31)
	%:	21	36	17	20	7	16	31	17	23	13	

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		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
ACRL should consider a newsletter or column in an existing journal addressed to the higher education community (e.g., colleges and universities, accrediting bodies, government agencies, etc.).		68	94	28	46	11	94	87	25	32	12	(32-33)
	%:	28	38	11	19	4	38	35	10	13	5	
ACRL should continue to design Continuing Education courses in the format of a coordinated and integrated curriculum of presentations at progressive grade levels.		62	100	46	26	5	51	107	55	27	4	(34-35)
	%:	26	42	19	11	2	21	44	23	11	2	
ACRL should seek to relate its Continuing Education program to useful parallel offerings of other agencies or associations.		57	105	38	28	8	62	106	41	25	8	(36-37)
	%:	24	44	16	12	3	26	44	17	10	3	
CE course packages should be offered by:												
a. mail		85	89	33	24	9	84	83	32	31	17	(38-39)
	%:	35	37	14	10	4	34	34	13	13	7	
b. television		34	88	52	50	13	44	96	48	39	15	(40-41)
	%:	14	37	22	21	5	18	40	20	16	6	
c. teleconferencing		30	101	48	47	12	40	100	42	47	15	(42-43)
	%:	13	42	20	20	5	16	41	17	19	6	
d. Computer Assisted Instruction		41	100	48	34	14	55	96	50	31	12	(44-45)
	%:	17	42	20	14	6	23	39	20	13	5	
Continuing Education course packages should be available for individual or group use.		89	106	23	17	7	112	99	18	13	4	(46-47)
	%:	37	44	10	7	3	46	40	7	5	2	
ACRL should continue to increase its commitment to the establishment of new local chapters.		63	93	51	27	7	64	80	54	34	14	(48-49)
	%:	26	39	21	11	3	26	33	22	14	6	
ACRL should continue efforts aimed at rationalizing ACRL/chapter relationships, such as the recent revision in ACRL funding of chapters.		47	87	77	20	3	48	81	88	19	5	(50-51)
	%:	20	37	33	9	1	20	34	36	8	2	

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• In lieu of some funding, ACRL should deliver more services to chapters, such as counseling and programming.		36	109	38	49	7	41	100	44	47	11	(52-53)
	%:	15	46	16	21	3	17	41	18	19	5	
• Career counseling and placement activities, such as the existing job exchange roster for international exchanges, should be enlarged.		41	138	23	32	5	49	119	25	41	9	(54-55)
	%:	17	58	10	13	2	20	49	10	17	4	
• ACRL's advisory/referral capability should be broadened to include a consulting roster and/or skills directory.		43	129	30	34	6	46	111	37	39	12	(56-57)
	%:	18	53	12	14	2	19	45	15	16	5	
• A Board member should be assigned to meet with and act as liaison, but not advocate, for each ACRL standing committee.		38	85	70	39	11	40	70	81	41	13	(58-59)
	%:	16	35	29	16	4	16	29	33	17	5	
• A Public Information Committee composed of ACRL's Past President, the ACRL councilor, and the Executive Director, should be established to coordinate the communication of ACRL views and positions to the larger library community and higher education (eg. press releases).		57	110	40	25	5	65	97	40	28	11	(60-61)
		24	46	17	11	2	27	40	17	12	5	
• The Planning Committee should remain responsible for:												
a. short range planning		104	71	40	17	3	88	82	45	19	6	(62-63)
	%:	44	30	17	7	1	37	34	19	8	3	
b. periodic review of long-range goals and objectives.		112	73	40	9	0	107	82	44	7	2	(64-65)
		48	31	17	4	0	44	34	18	3	1	
• The Board should be encouraged to become more conscious of the full costs (dollars and staff time) of programs.		126	72	29	10	2	137	67	29	8	2	(66-67)
	%:	53	30	12	4	1	56	28	12	3	1	

		FEASIBILITY					DESIRABILITY					
		1	2	3	4	5	1	2	3	4	5	
• There should be an upgrading of executive staff salaries to be equivalent with a strong academic library directorate.		30	78	55	74	12	61	97	55	30	8	(10-11)
	%:	12	31	22	30	5	24	39	22	12	3	
• Greater permanence in headquarters personnel should be sought.		27	90	71	54	8	47	104	72	19	11	(12-13)
	%:	11	36	28	22	3	19	41	28	8	4	
• ACRL should commission the design of an improved Management Information System program to aid in decision making.		20	83	74	60	10	18	78	80	54	22	(14-15)
		8	34	30	24	4	7	31	32	21	9	
• ACRL leadership should increase its voice in and support of ACRL objectives in all forums (such as government agencies, professional circles, scholarly circles, etc.).		69	122	12	37	8	105	109	17	19	2	(16-17)
		28	49	5	15	3	42	43	7	8	1	
• ACRL should re-commission a study of the feasibility of utilizing teleconferencing techniques to:												
a. extend programs delivery capability to local, regional and national audiences.		43	101	44	49	12	59	81	45	44	22	(18-19)
	%:	17	41	18	20	5	24	32	18	18	9	
b. facilitate conduct of Board, section and committee business.		40	92	52	54	11	45	82	56	43	23	(20-21)
	%:	16	37	21	22	4	18	33	22	17	9	
• The feasibility of development of future files for online remote terminal access, such as:												
	%:	25	47	14	10	3	17	40	17	18	8	
a. committee rosters		61	113	34	24	8	41	98	41	44	20	(22-23)
b. research-in-progress files		60	125	31	21	3	68	110	33	24	9	(24-25)
	%:	25	52	13	9	1	28	45	14	10	4	
c. skills directories		51	115	37	32	3	50	103	40	37	12	(26-27)
	%:	21	48	16	13	1	21	43	17	15	5	
d. placement listings		67	126	27	18	2	86	106	28	16	8	(28-29)
	%:	28	52	11	8	1	35	43	11	7	3	
e. committee histories		43	112	40	39	6	28	77	46	75	18	(30-31)
	%:	18	47	17	16	2	11	32	19	31	7	

		FEASIBILITY					DESIRABILITY					
• Workshops and orientation sessions should be held for all new committee appointees.		1	2	3	4	5	1	2	3	4	5	(68-69)
		71	102	19	45	4	110	99	16	16	8	
	%:	29	42	8	19	2	44	40	6	6	3	
• Leadership/group dynamics workshops for newly elected officers and committee chairs should be sponsored.		1	2	3	4	5	1	2	3	4	5	(70-71)
		53	103	26	51	5	80	87	29	37	14	
	%:	22	43	11	21	2	32	35	12	15	6	
• Ad hoc committees should continue to function promptly, and to be discharged on a timely basis.		1	2	3	4	5	1	2	3	4	5	(72-73)
		128	84	15	12	3	155	67	13	7	4	
	%:	53	35	6	5	1	63	27	5	3	2	
• ACRL should encourage measures, such as by relieving staff of committee paperwork, to enhance the economical operation of committees.		1	2	3	4	5	1	2	3	4	5	(74-75)
		66	90	36	36	11	101	81	38	17	8	
	%:	28	38	15	15	5	41	33	16	7	3	
• ACRL leadership should continue to develop its ability to sample membership opinion reliably and quickly for such things as program evaluation, planning, setting priorities, etc.		1	2	3	4	5	1	2	3	4	5	(76-77) 78-80 BL
		101	105	10	22	3	133	89	12	8	4	
	%:	42	44	4	9	1	54	36	5	3	2	
• ACRL should continue to study the comparative costs of in house versus contracted services for Management Information Systems, conference planning, publishing, telecommunications, etc.		1	2	3	4	5	1	2	3	4	5	(4-5)
		106	94	15	21	6	119	90	21	10	7	
	%:	44	39	6	9	2	48	36	9	4	3	
• The electronic mail system between headquarters and members, ACRL committees, officers, etc. should be continued.		1	2	3	4	5	1	2	3	4	5	(6-7)
		71	82	67	19	4	70	77	75	20	4	
	%:	29	34	28	8	2	28	31	30	8	2	
• ACRL should commission a study of the work load and work flow in the main office.		1	2	3	4	5	1	2	3	4	5	(8-9)
		42	84	73	29	12	30	66	87	41	22	
	%:	18	35	30	12	5	12	27	35	17	9	

- Funding should be strengthened and increased for a program of incentive rewards for:

	FEASIBILITY 1 2 3 4 5	DESIRABILITY 1 2 3 4 5		
a. best research	64 108 19 39 11	80 91 20 41 15	(32-33) %: 27 45 8 16 5	32 37 8 17 6
b. innovative ideas	62 109 21 39 11	95 84 19 37 13	(34-35) %: 26 45 9 16 5	38 34 8 15 5
c. most active chapter	35 95 40 51 18	31 60 44 76 34	(36-37)	
%:	15 40 17 21 8	13 24 18 31 14		

The following questions are included in this survey so that necessary demographic and attitudinal data may be collected. It will be used to determine if different groups within ACRL's membership have different priorities for ACRL

- What is your age group? (38)

5 M	21	20-30	93	31-40	51	41-50	65	51-60	26	61+	
%	8		36		20		25		10		

- What is your sex? (39)

5 M	96	Male	160	Female
%	37.5		62.5	

- What academic degrees have you completed? (Check all that apply) (40-45)

M		%
15	2-year college degree	6
175	4-year college degree	32
225	M. L. S.	88
101	Other graduate degree	39
38	Ph.D.	15
23	Other (please specify) ______	9

Which type of institution best describes your place of employment? (46)

		%
15	Community College	6
38	Four-year Liberal Arts College	15
29	Comprehensive Four-year College	11
42	Research/Doctoral Granting Institution (non ARL member)	16
89	Research/Doctoral Granting Institution (ARL member)	35
43	Other (please specify) ______	17

- Which of the following best describes the type of work you do? (47)

		%
74	Public Services (Reference, Interlibrary Loan, Bibliographic Instruction, Government Publications, Media, etc.)	29
28	Technical Services (Acquisitions, Cataloging, Serials, etc.)	11
8	Collection Development	3
4	Systems and Automation	2
73	Administration	28
4	Library Education	2
	Other (please specify) ________________	9
41	Combinations	16

- Are you eligible for tenure identical to the teaching faculty at your institution? (48)

114 Yes 115 No 9 Unsure
% 48 48 4

- Is your position ranking identical to the ranking used for teaching faculty (e.g, assistant professor, associate professor, professor)? (49)

105 Yes 127 No 4 Unsure
% 44 54 2

- Does your institution provide financial support for professional travel? (50)

219 Yes 22 No 8 Unsure
% 88 9 3

  - If you answered yes to the above question, have you used such financial support? (51)

    208 Yes 15 No ___ Unsure
    % 93 7

- Are you eligible for sabbatical or research leaves? (52)

125 Yes 91 No 31 Unsure
% 51 37 12

- How many years have you been a member of ACRL? (53)

118 0-5 58 6-10 27 11-15 22 16-20 30 more than 20
% 46 23 11 9 12

- Do you belong to an ACRL regional chapter? (54)

111 Yes 103 No 23 Don't Know 15 No Regional Chapter Available
% 44 41 9 6

  - If you answered yes to the above question, to which chapter do you belong? (55)

    ____

- Are you a member of any ACRL Committee(s)? (56)

28 Yes 216 No 9 Don't Know
% 11 85 4

  - If Yes, what committee(s)? (57-62)

    ____

  - If you do not hold an ACRL committee appointment, would you be interested in having one? (63)

    97 Yes 42 No 77 Unsure 11 Not applicable
    % 43 19 34 5

  - If you answered Yes or Unsure to the above question, do you feel you could get an ACRL committee appointment? (64)

    % 28 23 47
    51 Probably 41 Probably not 85 Don't know
    4 Not applicable
    % 2

- Have you ever served on the ACRL Board? (65)

10 Yes 243 No
% 4 96

- Did you vote in the last election for ACRL officers? (66)

175 Yes 47 No 31 Unsure
% 69 19 12

- Have you attended an ACRL regional chapter meeting within the past three years? (67)

103 Yes 150 No
% 41 59

- Have you attended an ACRL national conference?

% 15 84 1

1978 (Boston): 36 Yes 206 No 3 Unsure (68)
1981 (Minneapolis): 33 Yes 209 No 2 Unsure % 14 86 1 (69)
1984 (Seattle): 37 Yes 209 No 2 Unsure (70)

% 15 84 1

- Have you attended an ALA Midwinter Conference within the past three years? (71)

95 Yes 164 No
% 37 63

- Have you attended an ALA Annual meeting within the past three years? (72)

171 Yes 88 No
% 66 34

- How frequently do you read the College & Research Libraries News? (73)

% 66 26 5
170 Always 68 Frequently 14 Sometimes
6 Seldom 1 Never
% 2

- What amount of the College & Research Libraries News do you read? (74)

54 All 112 Most 55 About half 37 Some 1 None
% 21 43 21 14

- How frequently do you read College and Research Libraries? (75)

149 Always 73 Frequently 27 Sometimes 10 Seldom ___ Never
% 58 28 10 4

- What amount of College and Research Libraries do you read? (76)

34 All 94 Most 74 About Half 56 Some 1 None
% 13 36 29 22

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A

APPENDIX B STRATEGIC FACTORS REPORT

I. External Factors Analysis Statement

The first draft of this statement was prepared by the ACRL Planning Committee. It was then revised by the ACRL Strategic Planning Task Force and incorporated into their planning process, which will culminate in a written five-year plan for the Association. The statement is essentially an updating of the environmental considerations portion of the original ACRL activity model (College & Research Libraries News, May 1982, p.16)

A. Economic Considerations

1. The concept of information as a commodity will increasingly influence decisions relating to libraries.

2. Steady-state or declining purchase power will be available to academic/research libraries.

3. Costs of computing hardware will decline; the costs of software and telecommunications will increase.

4. Competition between libraries and other organizations, both on campus and in the for-profit sector, will increase.

5. Libraries will be expected to increase productivity.

B. Political Considerations

1. Information will be an increasingly important strategic factor in domestic and international markets and in world politics.

2. Conflict will escalate among government, business and academia over the ownership, value, and control of information.

3. Federal government attitude toward academic/ research libraries will be increasingly laissez-faire.

4. State governments will increase efforts to centralize authority/ control over tax-supported higher education, including academic libraries.

5. The distribution of computing power will diminish the political impact of national consortia.

6. Local, state, & regional computer-based networks will continue to develop.

7. There will be continuing international pressure for bibliographical standardization.

C. Social Considerations

1. Equality of opportunity for women and minorities will continue to be an elusive goal.

2. Illiteracy will continue to be a problem in spite of the efforts of schools, libraries, and the educational reform movement.

3. Well-organized political and religious groups will continue to mount challenges to intellectual freedom.

4. The development of massive databases may threaten individual privacy.

5. Academy-based research activity will advance slowly.

6. The demographic profile and educational needs/expectations of college students will continue to change.

7. The use of non-print and micro-based materials in research and college teaching will increase.

8. Society will continue to press for dollar accountability.

D. Technical Considerations

1. Word processing/communication/computer technology will improve and proliferate.

2. Advances in storage technology will alter the way in which information is published and distributed.

3. Changes in technology will change the kinds of information services provided.

4. Libraries and the for-profit sector will be in competition to meet the demand for speedier delivery of information/documents.

5. Personal ownership of word processing/computing/telecommunications hardware and software will continue to increase.

6. As the use of terminals and microcomputers grows, access to information will become more decentralized.

7. Preservation methods for disintegrating library book stocks will become more effective and more widely used.

E. Human Resources

1. The rigorous competency standards of the educational reform movement will improve the performance of both teachers and students in public schools.

2. Scholarly communication will continue in its present state of relative good health; researchers, scholarly publishers, and librarians will continue to be the major links in the process.

3. Libraries will not become less labor intensive but will require a new mix of staff and skills.

4. Libraries will remain in competition with other organizations for staff.

5. Society will require training and the help of intermediaries to use proliferating online information sources.

6. Information management and data processing staff will be increasingly costly to hire and retain.

rev. 7/6/85

II. Opportunities and Threats

Opportunities and Threats Facing ACRL

Opportunities

Increase membership base, minorities.

Use new communications technology to offer programs, conferences.

Seek new members now in other divisions & associations; especially attract members with special interest in science.

Develop more effective MIS to aid in planning and programming.

Use strategic planning process to better communicate what ACRL is and does.

Facilitate research and scholarship.

Fund raising: for associations; for libraries.

Joint activities with other associations and divisions.

Threats

Loss of members due to weak programming.

Other associations: SLA, MLA, ASIS, state associations.

Other divisions: LITA, LAMA, RTSD.

Increased association dues.

Public relations image of academic libraries and librarians.

Negative image of ACRL within ALA.

APPENDIX B

III. Market Analysis

Market Analysis of the Association of College and Research Libraries

(Historical, Present, and Future)

° Overall markets and consumers.

Professional librarians

Nonprofessionals?

Working in

college libraries
university libraries
libraries in large research institutions
libraries in non-academic research institutions
community college libraries
preparatory school libraries
research institutes
businesses catering to academic and research libraries

ACRL now has as members 8,000 of the est. 22,000 professional librarians working in academic and research libraries in the US.

° Economics.

Librarians' salaries are relatively low among professionals. In non-ARL university libraries, the average professional salary is $24,100. Few libraries pay their employees' professional association dues. Many academic libraries provide at least partial reimbursement for their employees to attend one professional meeting per year.

° Competitive trends.

Many librarians are seeking alternative careers. The movement between libraries and vendors as a career path is increasingly common.

Special libraries are often perceived as offering better salaries and more opportunity for advancement than academic libraries.

Careers in information brokering often become attractive to academic and research librarians

Association competition.

-- Several other associations are in direct competition with ACRL for members: ASIS, SLA, MLA, AALL

-- Some associations are not in competition for members, but do compete effectively for our members' time and commitment: ARL, RLG, OCLC

-- Several associations attract members of part of the ACRL community; archivists - SAA; historians -- AHA, others - Soc. for Scholarly Publishing, e.g.

° Technological.

Library technology is involving many more academic and research librarians.

Also, use of technology by librarians for personal and association business is on the increase.

Some librarians resist technology and do not wish to use it.

Many jobs in academic libraries require use of online systems for reference, circulation, and technical services.

° Government/Political/Legal.

State government intervention in public universities internal budgeting and accounting is on the increase; libraries are experiencing a great need to justify expenditures; are learning to behave in a similar way vis-a-vis their professional association

Tax policies under consideration may jeopardize gift and contributions revenue to libraries in academic institutions.

Public institutions experience frustration with government regulations made without understanding of library constraints.

Copyright issues involving computer hardware and software mean librarians must learn about the law and implement it carefully.

ACRL is affected by government regulations regarding its non-profit status as an "educational" organization.

° Social.

The overall trend toward decentralization is of significance to ACRL. Encouragement and support of chapters caters to this trend. A movement toward regional offerings of courses, institutes, and other learning experiences can also address this.

Within the library community, academic librarians are sometimes perceived as elitist. ACRL is the largest and most financially stable division of ALA -- sometimes perceived negatively by other divisions.

° History.

A brief history of the Association is at Appendix A

APPENDIX C STRATEGIC AUDIT REPORT

I. Programs and Activities

ACRL's major activities fall into the following categories:

Publications: ACRL publishes College and Research Libraries, a journal of serious articles on academic librarianship; College and Research Libraries News, a news magazine including reports on library projects! Rare Books and Manuscripts Librarianship, a journal concerning librarianship as practiced in special collections; newsletters of its sections; Choice Magazine, a magazine of reviews for academic libraries; and non-serial publications including reports of committee and section projects, the series Publications in Librarianship, and statistics reports.

Membership Activities: ACRL provides membership services, recruits new members and seeks to maintain present members; supports the activities of its Board and Executive Committee and its Budget and Finance Committee; allocates funds for the support of its sections, chapters, and committees and staff support for discussion groups; provides advisory services; carries on statistical and minor research activities; and operates a Jobline.

Conferences and Professional Development: ACRL holds a national conference every three years; offers continuing education courses at ALA Midwinter and Annual Conferences and at the ACRL National Conferences; makes courses and other activities available at the regional level; & holds an annual preconference of its RBMS Section.

Judith L. Hegg's recent article in the Journal of Library Administration presents an excellent analysis of some aspects of the participation of academic librarians in continuing education activities. Ms. Hegg derives a profile of academic librarians who do and do not participate in such activities. ACRL participation can now be measured against some national figures, and some marketing initiatives are now underway using this data.

Table SA 1 presents registration figures for ACRL courses from ALA Annual Conference, 1981, through the division national conference, 1986. A total of 1130 participants took part in 76 courses during this time. In general, evaluations tend to fall in the excellent and good categories.

Funded Projects: ACRL seeks funding for projects which serve its members but which it cannot fully support. Recently the major such project has been a series of workshops offered jointly by PLA and ACRL on humanities programming and was funded by NEH.

Research: While remaining one of ACRL's goals, this had not been effectively addressed until the 1984-5 year, when the Committee on Research Development, ad hoc, developed a plan for Research Clinics and implemented the first such clinic at the 1985 Annual Conference of ALA. Plans for extending this activity are now underway. The impact on the quality of papers presented at the National Conferences is expected to be felt by the 1989 Conference in Cincinnati.

A summary of ACRL programs and activities, with approximate figures showing input and output measures is attached as Table SA 2.

II. Policies

ACRL is a mature association, although it has undergone constant growth and reorganization in order to remain a viable organization for its members. Its activities are based in a firm foundation of policies and procedures which give direction to its programs and activities, allow for consistent decisions to be made, and permit continuity of operation. Among the foundations documents are the Constitution and Bylaws and guidelines regarding chapters, responsibilities of officers, the Budget and Finance Committee, other Committees, elections and appointments, meetings and conferences, publications, copyright, ethics, free materials, legislation, and standards.

III. Present Strategies

ACRL is in need of strategic planning because its strategies are rather haphazard. For the past several years our strategy for budgeting conservatively in anticipating revenues and generously in anticipating expenses, has been successful. Stringent fiscal controls have been exercised, at least partly because ALA policies have kept salaries down and have constrained expenditures. In addition, a strategy of developing non-dues sources of revenue has been successful in bringing ACRL publishing and conference/continuing education programs to a point where they return all their direct costs, and most of their salary and other indirect expenses. Funded projects have been sought and carried out as a way of supplementing dues revenue to accomplish member goals.

The success of these strategies has resulted in the growth of a reserve fund, now amounting to about six months' expenses. Future planning must give direction to the programs and activities of the association, helping its leaders maintain a safe financial reserve, while effecting the desired goals.

ACRL has an active policy of pursuing new members and retaining existing members. Work with library schools, letters to academic appointees, follow-up letters to those who drop their membership, and mailings to certain targeted groups have been used to solicit members.

In the area of publications, ACRL has a policy of publishing short works of somewhat limited distribution. With the exception of its four serials and the Publications in Librarianship series, ACRL does not aspire to being a major publisher. For the most part, works published grow out of ACRL unit activities.

In its effort to encourage research and publication, as well as making professional development opportunities available to its members, ACRL uses national conferences, held every three years according to ALA policy. The general strategy of professional development and continuing education is in transition, from a program heavily based on courses offered at ALA Annual and Midwinter conferences and at ACRL National Conferences, to one which provides learning opportunities in a variety of formats, locations, and times.

Alone among divisions, ACRL has pursued a strategy of chapter development. ACRL chapters bring association activities to the member, supporting program activities at the local level and offering another opportunity for member participation.

ACRL is also committed to a member-driven Association-wide planning process, exemplified by the work of the Task Force. In addition, ACRL is consciously and by choice operating as a division of the American Library Association and has a commitment to supporting the concept of one library association for all types of libraries and all library functions, with divisions enhancing the value of ALA membership in general, and ACRL in particular serving the needs of academic and research librarians.

IV. Structure

ACRL and its sub-units have 182 committees. Of these, 89 are "housekeeping committees," serving such functions as nominating, budgeting, membership, planning, and conference programming. Most fit into the present set of goals and objectives; some 35 do not; they serve specific goals of sub-units. Committees are appointed by the President to carry out a specific charge. There are 26 standing committees and Editorial Boards which are charged with ongoing functions of the association. Task Forces and ad hoc committees are used to serve time-limited purposes.

Sections are membership units selected by members at the time they join or renew their membership in ACRL. There are three type-of-library sections: University Library Section (ULS), College Library Section (CLS), and Community and Junior College Library Section (CJCLS.) 10 type-of-activity sections are based on the kind of work their members do. These include: Anthropology and Sociology (ANSS), Art (ARTS), Asian and African (AAS), Bibliographic Instruction (BIS), Education and Behavioral Sciences (EBSS), Law and Political Science (LPSS), Rare Books and Manuscripts (RBMS),Science and Technology (STS), Slavic and East European (SEES), and Western European Specialists (WESS); and Women's Studies (WSS).

Discussion Groups afford a less formal structure, permitting members to discuss matters of common interest, without electing officers, holding committee meetings, or dealing with budget and administrative affairs.

Chapters are important organizations related to ACRL. Not all chapter members are ACRL members, and most chapters are actually sub-units of state library associations. The Chapter structure allows academic and research librarians to meet close to home for purposes of professional development and networking. There are 36 chapters at the end of Midwinter, 1986.

V. Strengths and Weaknesses

The Task Force identified these major strengths and weaknesses of the Association at its April 1985 meeting:

Strengths	Weaknesses
Largest division	Not addressing needs of science and technology librarians; systems people; tech. services people; museum libraries
Most money	
Publications program	Perception of being "elite"
Broader perspective than just information and technicians	Fragmentation
ACRL members serve on ALA committees	People don't know what ACRL is
Strong staff	Not enough links with other associatio
Standards basis; good evaluation of programs by members	Not enough research done on librarian
Good officers	Poor image of librarians in academic community
National conferences	Too many meetings in a year

Table SA 2. Programs and Activities

MAJOR ACTIVITY	ACRL UNITS INVOLVED	# PEOPLE INVOLVED	# PEOPLE AFFECTED	STAFF HRS. PER YEAR	STAFF COST	DIRECT EXPENSES	TOTAL COST	REVENUE GENERATED
National Conf.	Conf. Committee Staff: Segal, Bourdon, Eberhart Davis, Donnelly, et. al.	200	2000	4,550 in conf. year	$ 77,000. (Balto.)	$ 193,000	$ 27,000	$ 270,000
Publications	Choice C&RL C&RL News RBML Sect. Nsltrs. In House pubs.	23 staff Editorial Boards:27 Volunteer Editors:17 Publ. Comm: 10	8,000+	43,500	$588,000 (85/6)	$870,000	$1,458,000	$1,563,000
Continuing Education	2 Committees staff: Donnelly.	1.5fte staff; 18 on committees	828 participants through MW 85	1,820	$ 30,800	$ 17,900	$ 48,700	$ 48,700
Membership Activities: Chapters, Committees, Sections, Board, Discn. Gps., Research, Statistics, Jobline...	Staff: Miller, Bourdon, Segal Members: 14 Sec., 12 Disc. Gps., 26 Comm., 36 Chaps.	5 staff, 350 members in leadership positions	8,000	5,280	$ 89,000	$ 80,000	$ 169,000	$ 221,000
Funded Projects	Staff: Donnelly, Segal. Members. min. involvement	.25fte staff	8,000	550	$ 9,200	$ 65,800	$ 75,000	$ 75,000

APPENDIX D RESOURCES REPORT

I. Financial History Summary

Table RR 1, ACRL Financial History 1980-1985, includes the actual revenues and expenses for the years 1980-81 through 1984-85. Also shown are the percentages of revenue or expense represented by each of the major categories.

Table RR 2, 1986-87 Preliminary Budget Executive Summary compares the budget for 1986-87 with the budgeted and actual revenues and expenses for the past two fiscal years. This version includes actual revenues and expenses for 1984-85.

II. Facilities

The ACRL staff occupies space on the fourth floor of the Huron Plaza office building at 40 East Huron Street, Chicago. We are on the southwest corner of the building. We have six individual offices and additional internal workstations to accommodate the present staff and equipment. There is also a supplies closet which includes a clothes closet, a small Ricoh copier, and office supplies. Other office equipment includes two CPT word processing stations, a DEST Optical scanner, a TI terminal for transmitting messages, and a Compaq Plus microcomputer with telecommmunications, spreadsheet, and database software.

ACRL also has the use of ALA equipment and facilities, including an IBM copier, the ALA membership system on its own terminal adjacent to ACRL office space, and an ALA subscription system terminal, also on the fourth floor. ALA makes available machines to produce transparencies, Kroy lettering tape, and reduced copies.

The ALA headquarters library is equipped to provide most of the necessary monographic and serial requirements of the staff and is well-staffed so as to provide reference, circulation, and audio-visual services.

The Choice office in Middletown is also fully equipped.

III. Information Resources

The major management information reports used by ACRL are listed in Table RR 3, below. Staff is building files on the Compaq Plus. For instance, a growing database of membership files is in the database and searchable online, as well as being usable to generate reports and mailing labels. Financial reports are also on the Compaq. Monthly time sheets are calculated using this tool as well. The Budget database is now on the CPT word processor and available for look-up; we will probably move it to the Compaq. ALA's data processing department now produces many of the reports referred to on Table RR 3, and the new automation system is supposed to allow the tailoring of many more reports and access by divisions using their own microcomputers.

IV. Human Resources

ACRL's human resources fall into two main categories: staff and members.

The largest part of the work of the Association is carried out by its members. Working in sections, chapters, and committees, the members plan and carry out programs involving their members and others. They present programs at local and national meetings, hold discussion group meetings, edit and publish monographic and serial works, teach courses, develop and issue standards and guidelines, put on national conferences, and oversee the financial activities.

Staff members support such activities through the monitoring of administrative aspects, such as actual production of journals and monographs, overseeing meeting details, such as designing, printing, and mailing brochures about programs and activities, registering participants, arranging for meetings, workshops, and courses, and controlling the office procedures engendered by this activity. Staff also takes major responsibility for coordinating activities among units; preparing background documentation for the Board of Directors, Executive Committee, Budget and Finance Committee, and other units upon demand; building and maintaining the budget for the upcoming year; monitoring the financial situation on a day to day basis; answering advisory questions; keeping up liaisons with units as designated; and maintaining membership records, including the roster of all units.

The 8000 personal members work in 14 sections, 36 chapters, and 34 committees and task forces. There are 11 staff members: 6 exempt (professionals) and 5 non-exempt.

The development of leadership among members, particularly the Board of Directors, is of serious concern. The outcome of the ACRL-led Division Leadership Enhancement Program will be an ongoing program to ensure that Division officers have an opportunity to visit headquarters, learn about ALA and division operations, and meet with officers of other divisions.

V. ALA as a Resource

The Policies of the American Library Association in Relation to its Membership Divisions are currently under revision. These policies set forth the framework within which the Divisions operate, including the respective responsibilities of ALA, Divisions, and other ALA units. Division Boards play an important role in developing such policies.

Highly significant as a resource to ACRL are the facilities and services provided by ALA. Without them, ACRL's financial condition would be very different. An organization of the size of ACRL would require its own receptionist, a personnel officer, an accountant, a mailing facility of some kind, a good copy machine, a more fully developed computer system to accommodate subscription and membership functions, and would have to pay its own rent, telephone, and furniture expenses. Staff estimates that these items would cost ACRL approximately $95,000. in initial expenses for the first year (furniture, equipment) and about $65,000. annually in rent, $10,000 annually in telephone costs, and an additional $145,500 annually in salaries and equipment.

Divisions also serve as a resource for ALA. Division staff provide services to ALA members, both Division members and non-Division members. The Executive Directors in particular spend considerable amounts of time in ALA management activities, such as strategic planning, data processing design, budget design work, and interdivisional relations. The ACRL Executive Director spent approximately 15.5% of her time in such a activity in 1984-85. The dollar value of that time, including benefits, is $9,271. Division activities also generate revenue for ALA through overhead charges on preconferences, continuing education courses, funded projects, and division national conferences.

Table RR1

ACRL FINANCIAL HISTORY 1980 - 1985 1/15/1986

SOURCES OF REVENUE	1980-1981 $	%	1981-1982 $	%	1982-1983 $	%	1983-1984 $	%	1984-1985 $	%
Membership dues	$132,667.00	34.5%	$178,646.00	28.8%	$202,145.00	38.7%	$211,098.00	25.3%	$220,489.00	23.7%
Publications										
Choice	$735,567.00		$887,332.00		$944,697.00		$992,281.00		$1,086,281.00	
C&RL	$85,312.00	22.2%	$110,982.00	17.9%	$101,717.00	19.5%	$98,710.00	11.8%	$99,443.00	10.7%
C&RL News	$49,250.00	12.8%	$76,931.00	12.4%	$78,556.00	15.0%	$124,835.00	15.0%	$158,687.00	17.1%
In-house	$15,892.00	4.1%	$18,212.00	2.9%	$19,924.00	3.8%	$36,760.00	4.4%	$40,058.00	4.3%
BCL	$.00	.0%	$.00	.0%	$.00	.0%	$.00	.0%	$506.00	.1%
FJLS	$4,896.00	1.3%	$5,947.00	1.0%	$4,285.00	.8%	$4,199.00	.5%	$4,668.00	.5%
Subtotal	$890,917.00	40.4%	$1,099,404.00	34.2%	$1,149,379.00	39.2%	$1,256,785.00	31.8%	$1,389,643.00	32.7%
Conferences & Workshops										
National(79,81,84)	$38,605.00	10.0%	$128,416.00	20.7%	$.00	.0%	$241,289.00	29.0%	$327,763.00	35.3%
Pre-&Postconferences	$42,110.00	10.9%	$18,043.00	2.9%	$36,983.00	7.1%	$25,801.00	3.1%	$50,135.00	5.4%
Continuing Ed.	$9,445.00	2.5%	$32,965.00	5.3%	$20,195.00	3.9%	$41,168.00	4.9%	$31,353.00	3.4%
Subtotal	$90,160.00	23.4%	$179,424.00	28.9%	$57,178.00	10.9%	$308,258.00	37.0%	$409,251.00	44.1%
Funded Projects										
NEH Project A	$.00	.0%	$45,437.00	7.3%	$55,213.00	10.6%	$5,000.00	.6%	$112,047.00	12.1%
NEH Project B	$.00	.0%	$.00	.0%	$.00	.0%	$4,119.00	.5%	$.00	.0%
ALA Goal Award A	$.00	.0%	$.00	.0%	$.00	.0%	$5,213.00	.6%	$5,000.00	.5%
ALA Goal Award B	$.00	.0%	$.00	.0%	$.00	.0%	$5,000.00	.6%	$.00	.0%
Subtotal	$.00	.0%	$45,437.00	7.3%	$55,213.00	10.6%	$19,332.00	2.3%	$117,047.00	12.6%
Other										
Jobline	$5,170.00	1.3%	$4,250.00	.7%	$3,460.00	.7%	$3,515.00	.4%	$5,085.00	.5%
ACRL-100	$739.00	.2%	$.00	.0%	$.00	.0%	$.00	.0%	$.00	.0%
Other	$530.00	.1%	$.00	.0%	$.00	.0%	$2,580.00	.3%	$12,958.00	1.4%
Subtotal	$6,439.00	1.7%	$4,250.00	.7%	$3,460.00	.7%	$6,095.00	.7%	$18,043.00	1.9%
TOTAL REVENUE	$1,120,183.00	100.0%	$1,507,161.00	100.0%	$1,467,375.00	100.0%	$1,801,568.00	97.1%	$2,154,473.00	115.1%
Choice Revenue	$735,567.00		$887,332.00		$944,697.00		$992,281.00		$1,086,281.00	
TOTAL REV. W/O CHOICE	$384,616.00	100.0%	$619,829.00	100.0%	$522,678.00	100.0%	$809,287.00	97.1%	$1,068,192.00	115.1%
ADJUSTMENTS							$23,794.00	2.9%	$-139,740.00	-15.1%
TOTAL REVENUE	$384,616.00	100.0%	$619,829.00	100.0%	$522,678.00	100.0%	$833,081.00	100.0%	$928,452.00	100.0%

OBJECT OF EXPENSE										
Membership Activities										
Membership Svcs.	$6,025.00	1.6%	$17,286.00	3.5%	$28,144.00	5.5%	$12,263.00	1.8%	$20,427.00	2.4%
Exec. Comm. & Board	$6,168.00	1.6%	$.00	.0%	$5,771.00	1.1%	$8,159.00	1.2%	$38,064.00	4.4%
Budget & Finance Comm.	$.00	.0%	$.00	.0%	$3,646.00	.7%	$1,173.00	.2%	$686.00	.1%
Other		.0%		.0%		.0%		.0%		.0%
Sections	$1,821.00	.5%	$19,032.00	3.9%	$22,740.00	4.5%	$19,880.00	2.9%	$24,764.00	2.9%
Chapters	$5,067.00	1.3%	$18,323.00	3.8%	$26,306.00	5.2%	$29,842.00	4.4%	$37,261.00	4.3%
Committees	$5,933.00	1.5%	$21,281.00	4.4%	$25,933.00	5.1%	$20,966.00	3.1%	$40,213.00	4.7%
Discussion Groups	$.00	.0%	$972.00	.2%	$2,355.00	.5%	$1,067.00	.2%	$732.00	.1%
Advisory	$.00	.0%	$14,801.00	3.0%	$18,122.00	3.6%	$12,481.00	1.8%	$14,172.00	1.7%
Liaison	$6,691.00	1.7%	$10,692.00	2.2%	$19,601.00	3.9%	$19,333.00	2.8%	$2,172.00	.3%
ACRL-100	$623.00	.2%	$.00	.0%	$274.00	.1%	$101.00	.0%	$49.00	.0%
Research	$.00	.0%	$.00	.0%	$.00	.0%	$.00	.0%	$.00	.0%
Statistics	$.00	.0%	$228.00	.0%	$5,628.00	1.1%	$.00	.0%	$5,933.00	.7%
Jobline	$858.00	.2%	$2,298.00	.5%	$721.00	.1%	$1,548.00	.2%	$1,703.00	.2%
Other	$112,538.00	29.0%	$222.00	.0%	$.00	.0%	$.00	.0%	$20.00	.0%
Subtotal	$145,724.00	37.6%	$105,135.00	21.6%	$159,241.00	31.4%	$126,813.00	18.6%	$186,196.00	21.7%
Publications										
Choice	$751,404.00		$839,333.00		$854,385.00		$927,740.00		$967,294.00	
C&RL	$78,069.00	20.1%	$81,240.00	16.7%	$87,399.00	17.2%	$84,203.00	12.4%	$88,248.00	10.3%
C&RL News	$69,629.00	18.0%	$86,039.00	17.6%	$89,923.00	17.7%	$131,205.00	19.3%	$126,685.00	14.8%
In-House	$11,783.00	3.0%	$15,156.00	3.1%	$31,290.00	6.2%	$44,908.00	6.6%	$35,646.00	4.2%
FJLS	$1,601.00	.4%	$2,377.00	.6%	$1,902.00	.4%	$2,577.00	.4%	$3,598.00	.4%
BCL	$.00	.0%	$242.00	.0%	$1,676.00	.3%	$4,744.00	.7%	$3,310.00	.4%
Subtotal	$912,486.00	41.5%	$1,025,387.00	38.0%	$1,066,575.00	41.8%	$1,195,377.00	39.4%	$1,224,781.00	30.0%
Conferences & Workshops										
National (79,81,84)	$33,806.00	8.7%	$91,515.00	18.8%	$28,027.00	5.5%	$185,304.00	27.3%	$362,992.00	42.3%
Pre-& PostConferences	$34,909.00	9.0%	$15,767.00	3.2%	$20,978.00	4.1%	$25,499.00	3.7%	$26,939.00	3.1%
Continuing Ed.	$12,229.00	3.2%	$41,247.00	8.5%	$31,190.00	6.1%	$45,440.00	6.7%	$43,003.00	5.0%
Subtotal	$80,944.00	20.9%	$148,529.00	30.5%	$80,195.00	15.8%	$256,243.00	37.7%	$432,934.00	50.5%
Funded Projects										
NEH Project A	$.00		$48,549.00	10.0%	$55,213.00	10.9%	$8,869.00	1.3%	$128,029.00	14.9%
NEH Project B	$.00		$.00	.0%	$.00	.0%	$5,234.00	.8%	$.00	.0%
ALA Goal Award A	$.00		$.00	.0%	$1,053.00	.2%	$4,191.00	.6%	$6,406.00	.7%
ALA Goal Award B	$.00		$.00	.0%	$.00	.0%	$11,000.00	1.6%	$.00	.0%
Subtotal	$.00	.0%	$48,549.00	10.0%	$56,266.00	11.1%	$29,294.00	4.3%	$134,435.00	15.7%
TOTAL EXPENSES	$1,139,154.00	100.0%	$1,327,600.00	100.0%	$1,362,277.00	100.0%	$1,607,727.00	100.0%	$1,978,346.00	117.9%
Choice expenses	$751,404.00		$839,833.00		$854,385.00		$927,740.00		$967,294.00	
TOTAL EXP. W/O CHOICE	$387,750.00	100.0%	$487,767.00	100.0%	$507,892.00	100.0%	$679,987.00	100.0%	$1,011,052.00	117.9%
ADJUSTMENTS	$.00	.0%	$.00		$.00		$.00		$-153,853.00	-17.9%
TOTAL EXPENSES	$387,750.00	100.0%	$487,767.00	100.0%	$507,892.00	100.0%	$679,987.00	100.0%	$857,199.00	100.0%

FINHIST 19860115

NET	$-3,134.00		$132,062.00		$14,786.00		$153,094.00		$71,253.00	

ACRL

Table RR2

EXECUTIVE SUMMARY 86-87 BUDGET

	SOURCES OF REVENUE	1984-1985 BUDGET	1984-1985 ACTUAL	1985-1986 BUDGET	PROJECTION 1985-86	1986-87 BUDGET
Line 1	Membership dues	$198,550.00	$220,489.00	$221,425.00	$223,650.00	$247,800.00
Line 2	Publications					
Line 3	Choice	$1,115,600.00	$1,086,281.00	$1,220,405.00	$1,220,405.00	$1,294,495.00
Line 4	C&RL	$113,147.00	$99,443.00	$121,755.00	$119,200.00	$119,435.00
Line 5	C&RL News	$102,179.00	$158,687.00	$165,530.00	$177,990.00	$193,400.00
Line 6	In-house	$28,000.00	$40,058.00	$32,700.00	$34,720.00	$37,675.00
Line 7	BCL	$.00	$506.00		$350.00	$.00
Line 8	FJLS	$4,669.00	$4,668.00	$3,280.00	$3,280.00	$3,300.00
					$10,925.00	
	Subtotal	$1,363,595.00	$1,389,643.00	$1,543,670.00	$1,566,870.00	$1,648,305.00
	Conferences & Workshops					
Line 9	National(79,81,84)	$1,000.00	$327,763.00	$268,731.00	$269,938.00	$.00
Line 10	Pre-&Postconferences	$26,000.00	$50,135.00	$25,000.00	$22,850.00	$25,000.00
Line 11	Continuing Ed.	$52,540.00	$31,353.00	$48,740.00	$47,565.00	$33,550.00
	Subtotal	$79,540.00	$409,251.00	$342,471.00	$340,353.00	$58,550.00
	Other					
Line 12	Jobline	$3,009.00	$5,085.00	$1,680.00	$2,880.00	$1,335.00
Line 13	ACRL-100	$.00	$.00	$.00	$.00	$.00
Line 14	Other	$1,300.00	$12,958.00	$1,400.00	$500.00	$2,100.00
	Subtotal	$4,309.00	$18,043.00	$3,080.00	$3,380.00	$3,435.00
	Funded Projects					
Line 15	NEH Project A	$135,523.00	$112,047.00	$80,248.00	$80,248.00	$75,000.00
Line 16	NEH Project B	$.00	$.00	$.00	$.00	$.00
Line 17	ALA Goal Award A	$5,000.00	$5,000.00	$5,000.00		$.00
Line 18	ALA Goal Award B	$.00	$.00	$.00		$.00
	Subtotal	$140,523.00	$117,047.00	$85,248.00	$80,248.00	$75,000.00
	TOTAL REVENUE	$1,786,517.00	$2,154,473.00	$2,195,894.00	$2,214,501.00	$2,033,090.00
	Choice Revenue	$1,115,600.00	$1,086,281.00	$1,220,405.00	$1,220,405.00	$1,294,495.00
	TOTAL REV. W/O CHOICE	$670,917.00	$1,068,192.00	$975,489.00	$994,096.00	$738,595.00
Line 19	ADJUSTMENTS		$-139,740.00	$-80,248.00	$-80,248.00	$-75,000.00
	TOTAL REVENUE	$670,917.00	$928,452.00	$895,241.00	$913,848.00	$663,595.00

	OBJECT OF EXPENSE					
	Membership Activities					
Line 20	Membership Svcs.	$30,350.00	$20,427.00	$18,708.00	$18,708.00	$23,800.00
Line 21	Exec. Comm. & Board	$16,403.00	$38,064.00	$9,250.00	$33,910.00	$42,266.00
Line 22	Budget & Finance Comm.	$2,004.00	$686.00	$1,860.00	$410.00	$740.00
	Other					
Line 23	Sections	$33,054.00	$24,764.00	$37,139.00	$37,139.00	$60,977.00
Line 24	Chapters	$43,505.00	$37,261.00	$37,664.00	$39,578.00	$53,489.00
Line 25	Committees	$40,055.00	$40,213.00	$34,896.00	$34,896.00	$37,050.00
Line 26	Discussion Groups	$2,616.00	$732.00	$1,505.00	$1,505.00	$1,585.00
Line 27	Advisory	$29,376.00	$14,172.00	$18,260.00	$18,760.00	$16,280.00
Line 28	Liaison	$10,105.00	$2,172.00		$.00	
Line 29	ACRL-100	$350.00	$49.00	$912.00	$.00	
Line 30	Research	$6,348.00	$.00	$3,010.00	$3,010.00	
Line 31	Statistics	$7,190.00	$5,933.00	$2,545.00	$.00	$7,418.00
Line 32	Jobline	$1,024.00	$1,703.00	$1,665.00	$1,665.00	$1,820.00
Line 33	Standards distrib.					$3,545.00
Line 34	Other	$.00	$20.00		$32.00	$.00
	Subtotal	$222,380.00	$186,196.00	$167,414.00	$189,613.00	$248,970.00
	Publications					
Line 35	Choice	$1,092,811.00	$967,294.00	$1,148,183.00	$1,148,183.00	$1,239,673.00
Line 36	C&RL	$109,872.00	$88,248.00	$105,616.00	$104,911.00	$112,454.00
Line 37	C&RL News	$114,577.00	$126,685.00	$145,473.00	$146,779.00	$157,447.00
Line 38	In-House	$27,837.00	$35,646.00	$33,515.00	$33,515.00	$39,492.00
Line 39	FJLS	$2,296.00	$3,598.00	$2,680.00	$2,680.00	$4,463.00
Line 40	BCL	$813.00	$3,310.00	$63,272.00	$56,150.00	$73,750.00
					$10,000.00	
	Subtotal	$1,348,206.00	$1,224,781.00	$1,498,739.00	$1,502,218.00	$1,627,279.00
	Conferences & Workshops					
Line 41	National (79,81,84)	$37,927.00	$362,992.00	$271,143.00	$256,528.00	$.00
Line 42	Pre-& PostConferences	$25,986.00	$26,939.00	$24,732.00	$22,223.00	$25,000.00
Line 43	Continuing Ed.	$51,529.00	$43,003.00	$48,678.00	$50,246.00	$39,361.00
	Subtotal	$115,442.00	$432,934.00	$344,553.00	$328,997.00	$64,361.00
	Funded Projects					
Line 44	NEH Project A	$135,523.00	$128,029.00	$70,209.00	$70,209.00	$75,000.00
Line 45	NEH Project B	$.00	$.00	$.00		
Line 46	ALA Goal Award A	$4,265.00	$6,406.00	$5,000.00		
Line 47	ALA Goal Award B	$.00	$.00	$.00		
	Subtotal	$139,788.00	$134,435.00	$75,209.00	$70,209.00	$75,000.00
Line 48	UNALLOCATED	$.00		$45,848.00	$.00	$45,247.00
	TOTAL EXPENSES	$1,825,816.00	$1,978,346.00	$2,131,763.00	$2,091,037.00	$2,060,857.00
	Choice Expenses	$1,092,811.00	$967,294.00	$1,148,183.00	$1,148,183.00	$1,239,673.00
	TOTAL EXP. W/O CHOICE	$733,005.00	$1,011,052.00	$983,580.00	$942,854.00	$821,184.00
Line 49	ADJUSTMENTS	$.00	$-153,853.00	$-70,209.00	$70,209.00	$-75,000.00
	TOTAL EXPENSES	$733,005.00	$857,199.00	$913,371.00	$872,645.00	$746,184.00
	NET	$-62,088.00	$71,253.00	$-18,130.00	$41,203.00	$-82,589.00

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NOTES:

Line 10: 2 confs. closed out

Line 14: money retd. from LOEX Consulting rev.

Line 19: amts. deferred: Balto; BCL; NEH

Line 41: Seattle Balto. deferrals

Line 48: at year end, no unallocated expenses; all charged to programs.

Line 49: amts. deferred are Balto,BCL,NEH

Line 15: new NEH grant of $152,000 over 18 months.

Line 19: NEH

Net deficit: BCL; equipment.

Table RR 3

ACRL & ALA Management Reports

Title	Frequency	Source	Use
Staff time reports	monthly, cumulative, annual	staff members	account for past budget for future
Staff activity reports	weekly	staff members	weekly staff mtg. monthly mgt.
Management memo	monthly	Segal	report to key members
Choice reports. subscriptions Choice Reviews on Cards Advertising sales Advertising calls minutes of editorial meeting overview of monthly activities	monthly	Sabosik	Segal for monitoring, monthly mgt., memo
C&RL News reports:			
editorial asst. report	monthly	Friedlander	Segal for monitoring monthly mgt., memo
advertising report	monthly	Friedlander	"
Continuing ed. registrations	daily at peak registration time	Donnelly	monitor progress make go/no go decision
Exhibitor registrations	daily at pre-conference times	Donnelly	monitor progress make promo decisions
Publications inventory	monthly	Davis	monitor; make reprint decisions
Membership statistics	monthly	ALA; Miller	monitor; make promo. decisions; keep key members informed; monthly mgt. memos.

Table RR 3 (continued)

ACRL & ALA Management Reports

Title	Frequency	Source	Use
Chapter statistics	monthly,	Miller	monitor
Section statistics	monthly	Miller	monitor
Roster and update	quarterly	Opalka	keep mailing lists up to date
Warehouse stock report	monthly	ALA, Davis	monitor stock, make reprints decisions
C&RL Reports			
Editor's report	monthly	Editor	monitor
Advertising report	monthly	Choice	monitor
			monitor mtg. meol
National conference reports			
registrations amounts deposited	weekly preceding Confs.	ALA D.P.	monitor progre
Calendar item status report	monthly	Bourdon & Assistant	monitor
Statement of goals & objectives	monthly, quarterly	Segal and all staff reptg. to	monitor
Accomplishments report	monthly	"	"
Budget Performance reports	monthly	ALA Accounting	monitor
Expenditure Approvals	weekly	ALA Accounting	"
Travel listing	monthly monthly	ALA Executive offices	"
Travel planner and reports	whenever trip taken	Staff member	calculate per-trip cost & per-budget line cost.

Appendix A

ala report

An Operating Agreement between the American Library Association and Its Membership Divisions

Background. *When ALA adopted the principle that divisions would be funded from income derived from division dues and other division activities it was necessary to establish a rationale for separating those areas of division financial responsibility from those of the ALA General Fund. The instrument developed for this purpose was the "Dues Schedule Transition Document" adopted by Council in Jan. 1976.*

In general the "Dues Schedule Transition" has served ALA and the divisions very well. However, with the passage of time, the several revisions of the ALA dues structure, and the move into the new headquarters building, it seemed necessary to prepare a new statement.

Responsiblity for revision was assigned to the Committee on Program Evaluation and Support (COPES). The initial discussions of the operating agreement occurred at a special meeting of division representatives in April 1981. From this conference came an extensive draft of the agreement.

COPES began its work at the annual conference in 1981. Since then COPES has undertaken the following activities:

1) The operating agreement was discussed by division representatives, councilors, and COPES at the Planning and Budget Assembly at the San Francisco conference.

2) COPES has met twice with the Division Executive Directors to discuss the agreement.

3) At the fall 1981 Executive Board meeting COPES presented a statement of assumptions and principles which would govern its work on the agreement. Following Executive Board endorsement of this direction, COPES prepared a draft, which was submitted to the Executive Board and Council.

4) At midwinter the COPES draft was again discussed at the Planning and Budget Assembly. Further, it was discussed with the Executive Board and also was discussed by Council for about an hour in the Committee of the Whole.

Following these discussions, COPES prepared the draft which is printed below. This draft will be further discussed at a public hearing at the Philadelphia conference on Fri., July 9, and presented to Council for action.

Comments are invited.

COPES remains convinced that no single document can resolve the myriad questions which will inevitably arise in an organization as dynamic and complex as ALA. But we are equally convinced that this statement provides considerable opportunity for autonomy, innovation, and growth for divisions while at the same time insuring the health of ALA as a whole.—F. William Summers, chair, Committee on Program Evaluation and Support.

I. Purpose

This agreement revises and expands the document entitled "ALA Dues Schedule Transition" which was adopted by the ALA Council in January, 1976. The principal intent of the agreement is to define the fiscal and administrative policies between ALA and its membership divisions. The agreement is based upon the following basic assumptions:

A. The operating agreement is restricted to ALA and its membership divisions. While ALA does have fiscal and administrative relationships with other organizational units, e.g., offices, roundtables, committees, etc., these are governed by other compilations of policy and procedure.

B. A primary purpose of the operating agreement is to define those services which divisions receive from ALA at no cost and those for which charges are made to divisions. In addition, the document seeks to establish a cooperative framework in which the inevitable questions of organizational relationship can be addressed and resolved.

C. While it is the policy of ALA to provide considerable autonomy and responsibility to the divisions, the corporate and legal entity is the American Library Association. The resulting requirements of sound audit, accounting procedures, tax and legal requirements are ALA's and must be maintained in all acts of divisions.

D. Divisions of the association are expected to assume financial responsibility for division staff and division program activities, including division publications, within the limitations set by division budgetary ceilings for the appropriate fiscal year, as approved by the ALA Executive Board.

E. This agreement shall be reviewed periodically by all appropriate persons and shall be revised no later than five years from its acceptance.

II. Definitions

A. Budgetary Ceiling

ALA By-Laws Article IX provides, " . . . annual estimates of income shall be based upon the unexpended balance remaining from the previous year plus anticipated revenues for the next budget year. In no case may expenditures be budgeted in excess of the estimates of income arrived at in this manner . . . " The figure resulting from this calculation is the maximum level of expenditure for any division and hence becomes the budgetary ceiling. The derivation of the budgetary ceiling is a process involving collaboration between ALA fiscal staff and division staff, review by the ALA Committee on Program Evaluation and Support, and approval by the ALA Executive Board.

B. Balance

The amount remaining in a fund when debits have been subtracted from credits. Division balances are those sums remaining in a budget account at the end of a fiscal year after all expenditures are paid and constitute one element in the budgetary ceiling.

C. Basic Support

That array of services provided by ALA to all divisions at no charge as a result of the division's functioning as a membership unit of ALA. ALA will support the basic indirect costs of divisions up to the 1981 levels. Where higher levels result from the growth of division staff and/or program, additional indirect costs will be negotiated between ALA and the division. Basic support includes the following elements:

1. Administrative services—switchboard and receptionist services, telephone equipment, purchasing, shipping, receiving, mail distribution, and warehouse space and service.

2. Conference arrangements—Divisions will receive the support and assistance of the ALA Conference Arrangements Office. Support for annual conference and midwinter meetings will include such things as AV services, conference telephone services, staff travel and housing, postage, photocopying and duplication. Exhibit space and a parlor for division membership activities will be provided whenever space is available. Meal functions of divisions at conferences are expected to be self-supporting.

3. Fiscal services—routine fiscal services including accounting, payroll and related services, assistance with budget preparation, travel advances, and credit cards. Divisions will be provided budget reports at least monthly in such detail as the ALA accounting system permits. Charges to divisions for ALA services will be reviewed by Division Executive Directors.

4. Headquarters library services.

5. Membership record services.

6. Office space—Space and related costs (heat, light, janitorial services) in ALA-owned buildings will be provided on an equitable basis considering each division's personnel, equipment and non-warehouse storage needs at the level utilized in 1981.

7. Office supplies—standard office supplies such as pencils, pens, envelopes, etc. The list of standard office supplies maintained by ALA will be reviewed annually with representative participation from divisions.

8. Furnishings and equipment—ALA will purchase and own basic office equipment and furnishings such as desks, chairs, file cabinets, typewriters and office machines. Additionally, divisions may purchase from their own funds furnishings and equipment and shall have control over

the use and disposition of such furnishings and equipment.

9. Subscription services—to include maintenance of records, invoicing, supply of back issues, etc.

10. Personnel services—in the form of record maintenance, advertising, testing, orientation (see also section III E on Personnel).

11. Divisions will be supplied with regular mail services at no charge except for special mailings. Postage will be charged to division for letters or packages where postage is more than six times the prevailing first class rate.

III. Provisions

A. Dues

Divisions have the right to establish their own personal and organizational dues structures. (Adoption of this policy will require amendment to the ALA By-Laws Article I Membership Sec. 2A and 2C. It is COPES' recommendation that the scale for organizational dues and the list of benefits for membership contained in Article 2C be removed from the By-Laws and that the By-Laws simply reflect that organizational dues for ALA shall be established by the Executive Board and Council.

Further, the By-Laws should be amended to reflect the same principle for organizational dues as now exist for personal dues, i.e., division membership is separate from ALA membership and all organizations must belong to ALA and must pay division dues in order to belong to a division.

The By-Laws should also empower divisions to establish personal and organizational dues by vote of their membership.

Discount and special promotion dues authorized by the ALA Executive Board will apply only to that portion of dues applying to ALA membership. Divisions will receive proportionate reimbursement for "free" division choices of continuing and life members.

B. Council Actions with Fiscal Implications

Council resolutions which would impose specific assignments on a division will be reviewed by COPES with the division board of directors to assess any financial needs implicit in that assignment. COPES will report back to Council with recommendations as to any budgetary adjustments necessary to implement that assignment prior to final Council action on that item.

C. Publishing Activities

A division may publish materials in three ways: through ALA Publishing Services; on its own; or through an outside publisher. Materials prepared by a division must be offered to ALA Publishing Services for first consideration.

The ALA Publishing Committee has the responsibility for control of the ALA imprint. ALA's publishing program is administered through ALA Publishing Services including obtaining copyright and rights and provisions for duplication or republication for ALA and its units.

Divisions exercise editorial and managerial control of their periodicals. The ALA Publishing Committee will be informed of plans for any new division periodicals prior to publication.

ALA Publishing Services will pay royalties to divisions for division-generated materials. Divisions may negotiate with ALA Publishing Services on other variables of publishing.

A division has the option of purchasing the production and distribution services of the Central Production Unit. A division may also purchase advertising services from the Publishing Services Department, in which case ALA Publishing Services guarantees the net revenue forecast in accord with its annually revised Journal Advertising Plan.

ALA has the sole right to record and market programs at ALA conferences with the advance consent of the units and speakers. Royalties from the sale of recorded programs of division conference programs are credited to divisions. Divisions may arrange through the Publishing Services Department for recording at division preconferences, seminars, institutes, and workshops or they may arrange for the recording and marketing of these programs on their own.

D. Printing and Duplicating

Divisions will be charged for printing and duplicating services on an actual use basis.

E. Personnel

Each division shall be responsible for generating the income required for the salaries, wages, and fringe benefits of division employees. All employees of ALA operate under the general policies and procedures established by the ALA Executive Board and administered by the ALA Executive Director including the unified classification and pay plan.

ALA will annually review the need for staff cost of living adjustments which will be approved through normal ALA budgeting procedures. When approved, the cost of living adjustments are applicable to all ALA employees.

A uniform pay plan for ALA staff has also been established. In future revisions of this plan, ALA will seek to establish levels relevant to the variations in size and scope of the divisions. The assignment of the appropriate level for division staff shall be negotiated by the Executive Director of ALA and the Board of Directors of each division.

The process of recruitment, employment, retention, evaluation, and termination of division Executive Directors shall be a participatory process involving the participation and concurrence of the division Board of Directors. The division's Board of Directors shall have the opportunity to annually review the performance of the division's Executive Director.

Division Executive Directors shall have the authority to select, evaluate, and recommend termination of all division employees consistent with ALA personnel policies and practices.

Cost of interview travel for final applicants for division Executive Director positions is paid by ALA General Funds. ALA General Funds also pay a fixed amount toward moving costs for professional personnel of divisions.

Division employees who retire or are terminated are paid for unused vacation from a central fund produced from an annual charge against unit salary budgets.

F. Division Conference, Preconferences, and Related Programs

Divisions may conduct preconferences, workshops, institutes, seminars, and national division conferences. A division is responsible for all costs incurred in planning and carrying out such a conference. Indirect costs are paid to ALA based on the most recent indirect cost study made by the ALA fiscal staff and approved by the ALA Executive Board. Net balances (positive or negative) resulting from conferences are posted to the sponsoring division.

In the case of divisional national conferences, ALA will pay division income on net funds received in advance of such conferences. An agreement will be negotiated between ALA and each division holding a conference with respect to the rate of income to be paid, when funds begin to earn income, and the point at which the conference account will be closed and funds paid to the division. The agreement will also specify the conditions under which the division will pay income to ALA if funds are advanced. All funds generated by conferences will be under the control of the ALA Fiscal Services Department.

G. Annual Conferences

Annual conferences of the association are an association-wide activity pertinent to all members regardless of divisional affiliation.

Financial support from ALA to divisions and other units for annual conference programming will be the result of an explicit and equitable process in which the divisions participate.

H. Division Fund Balance

The Executive Board and Council endorse in principle the concept of income payments to divisions on their annual unbudgeted cash reserves. The reality is that the present ALA accounting system is not capable of producing the needed financial detail. ALA will give a high priority to upgrading the accounting system in order to implement this principle. During an interim period, the Executive Director shall begin the initial implementation of this policy with divisions having significant fund balances to establish procedures and recommend policies.

I. Special Projects of Divisions

All requests for external (non-ALA) funding for division projects must be approved by the division Board of Directors. Additionally, all proposals and contracts for such funds are signed by the Executive Director of ALA in the name of the association. All special projects are conducted in accordance with established ALA policies and procedures and the conditions of the grant or contract. ☐

APPENDIX E. PROPOSED PLANNING PROCESS

A proposed planning process for the Association of College and Research Libraries

Prepared by the Ad Hoc Planning Process Subcommittee

Susan Klingberg, Chair
Keith Russell, Member

ACRL's strategy for planning over the coming years.

At the January 1983 ALA Midwinter Meeting, the ACRL Planning Committee appointed a subcommittee to develop a planning process for the Association. The Subcommittee first outlined the elements which the process or model should include. It should: a) produce a written plan to guide ACRL for at least five years; b) have a built-in mechanism for evaluation and feedback; c) accommodate periodic reviews and updating; and d) simplify (as well as codify) the work of the ACRL Planning Committee in carrying out its responsibilities.

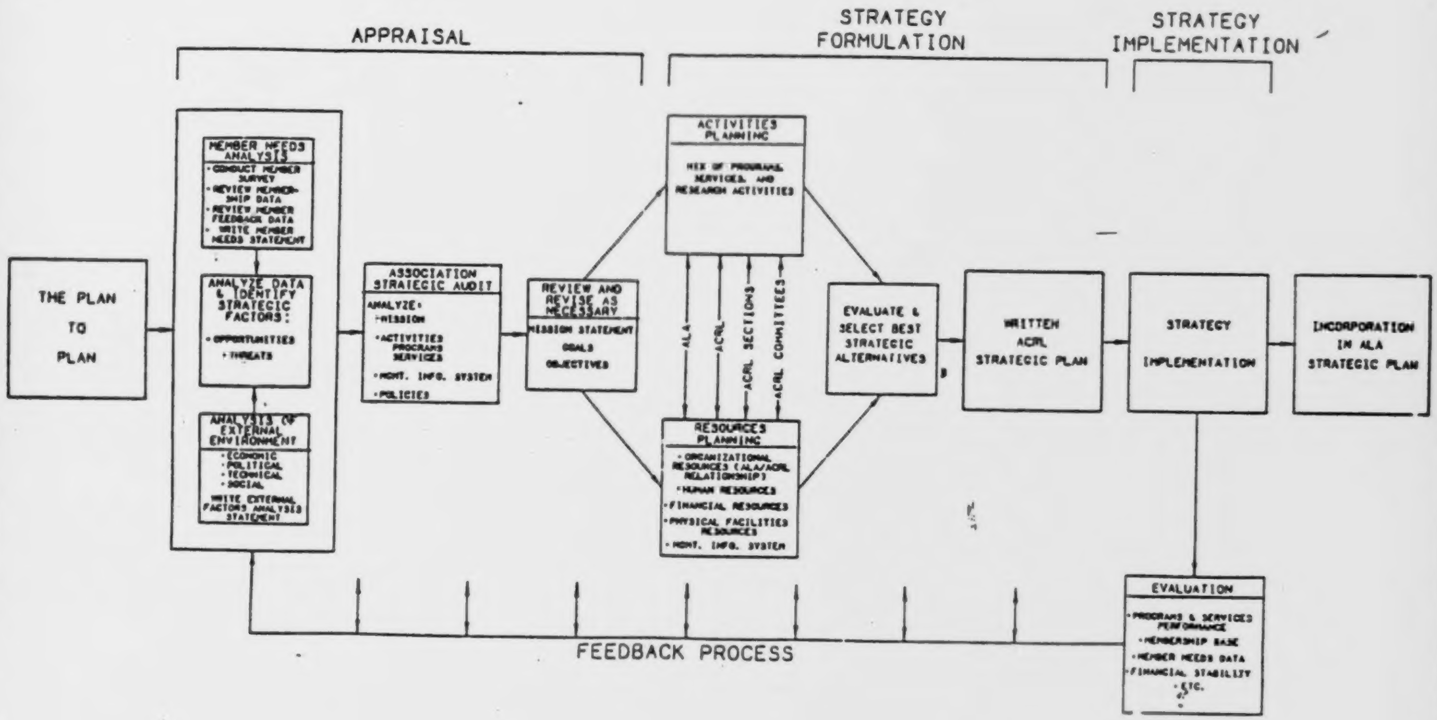
The model proposed in this report is a strategic planning model. The strengths of strategic planning have been widely discussed in recent management literature. In his book *Academic Strategy*, George Keller discusses the advantages of this approach. He describes strategic planning as *active* rather than passive, *responsive* to changing conditions, *competitive*, *decision-oriented*, and *participatory* (Johns Hopkins, 1983, pp.143–148). Another distinctive characteristic of strategic planning is its emphasis on formulating and evaluating alternative strategies.

Together, this report and model constitute a "plan for planning" for ACRL. It should first be reviewed and revised by the Planning Committee before being more widely distributed within ACRL. Following review and revision, the Subcommittee recommends the appointment of an ACRL Strategic Planning Task Force. The Task Force would be responsible for coordinating the planning process and writing the resulting strategic plan. When this is accomplished, the ACRL Planning Committee would take over responsibility for implementation of the plan, as well as evaluation, periodic review, and updating.

The planning process

Accompanying this report is a schematic diagram or model of the proposed planning process (see p.397). This section provides additional information about the steps in the process. The purpose of each step is explained, and related issues to be considered are discussed. Wherever possible, an appropriate group or body is named to carry out

ACRL STRATEGIC PLANNING MODEL


APPRAISAL
STRATEGY FORMULATION
STRATEGY IMPLEMENTATION
THE PLAN TO PLAN
MEMBER NEEDS ANALYSIS
• CONDUCT MEMBER SURVEY
• REVIEW MEMBERSHIP DATA
• REVIEW MEMBER FEEDBACK DATA
• WRITE MEMBER NEEDS STATEMENT
ANALYZE DATA & IDENTIFY STRATEGIC FACTORS:
• OPPORTUNITIES
• THREATS
ANALYSIS OF EXTERNAL ENVIRONMENT
• ECONOMIC
• POLITICAL
• TECHNICAL
• SOCIAL
WRITE EXTERNAL FACTORS ANALYSIS STATEMENT
ASSOCIATION STRATEGIC AUDIT
ANALYZE:
• MISSION
• ACTIVITIES PROGRAMS SERVICES
• MGMT. INFO. SYSTEM
• POLICIES
REVIEW AND REVISE AS NECESSARY
MISSION STATEMENT
GOALS
OBJECTIVES
ACTIVITIES PLANNING
MIX OF PROGRAMS, SERVICES, AND RESEARCH ACTIVITIES
ALA
ACRL
ACRL SECTIONS
ACRL COMMITTEES
RESOURCES PLANNING
• ORGANIZATIONAL RESOURCES (ALA/ACRL RELATIONSHIP)
• HUMAN RESOURCES
• FINANCIAL RESOURCES
• PHYSICAL FACILITIES RESOURCES
• MGMT. INFO. SYSTEM
EVALUATE & SELECT BEST STRATEGIC ALTERNATIVES
WRITTEN ACRL STRATEGIC PLAN
STRATEGY IMPLEMENTATION
INCORPORATION IN ALA STRATEGIC PLAN
EVALUATION
• PROGRAMS & SERVICES PERFORMANCE
• MEMBERSHIP BASE
• MEMBER NEEDS DATA
• FINANCIAL STABILITY
• ETC.
FEEDBACK PROCESS

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the step, and other stakeholders in the process are identified. An effort has been made to show the relationship of steps to one another. The diagram is meant to be a symbolic representation of the planning process. Aspects such as the sequence of steps should not be strictly interpreted. For example, some strategies may be approved and implemented while the plan is still being written.

The involvement of ALA, ACRL, and ACRL sections and committees is represented in steps 6 and 7 of the model, under "Strategy Formulation." Please note that these groups are involved at other steps of the process as well.

Appraisal

1. Analyze member needs. For this analysis, membership data is reviewed and trends are studied. Current members and potential members are profiled, as well as others who might make use of ACRL programs, e.g., non-ACRL members who attend ACRL continuing education programs. For these categories, both current and future needs that could be met by ACRL are identified. A formal survey of at least a sample of the membership is recommended. ACRL has not done a member needs assessment in recent years. President-elect Sharon Rogers has also expressed interest in a member survey. In addition to identifying member needs, the survey could provide feedback on the effectiveness of programs and services. Contracting with an outside consultant would be the most efficient way to conduct the survey.

Other sources of data should also be reviewed, such as membership files and evaluations from participants in ACRL continuing education programs. All of the data gathered on members and members' needs should be synthesized in a written members' needs statement. The analysis and resulting statement could be contracted out to a consulting firm experienced in member needs analyses. Another option is to assign responsibility to ACRL headquarters staff, who would work with the Membership Committee. It is expected that such an analysis could be completed in seven months. Provision should be made for updating the member needs data periodically.

2. Analyze the external environment. In this step, economic, political, technical, and social factors are reviewed which have an impact on the Association. The Activity Model Committee's final report (abbreviated AMFR; *C&RL News*, May 1982, pp.164–69) already does much of this, but it should be reviewed and updated to cover both current and anticipated environmental conditions.

The ACRL Planning Committee, since it has been heavily involved with the AMFR, should be given responsibility for this analysis and for the production of an external factors analysis statement. Work on this could begin at any time, and it could be completed in three months. A literature review of recent publications may be a good starting point.

3. Identify strategic factors. This step builds on the activities in the two preceding steps. The data collected is further analyzed and opportunities and threats facing the Association are identified and assessed. Much of this will be similar to a market analysis, where markets and competition are analyzed.

This analysis should be carried out by the ACRL Strategic Planning Task Force and should culminate in a working document which will guide subsequent planning activities. Suggested completion date is two months after step 1 is completed (i.e., the end of month 9).

4. Conduct a strategic audit. The strategic audit is a statement of ACRL's current situation and, to some extent, how it got there. It identifies the mission, activities, programs, services, policies, management information system, etc., of the Association, along with strategies it is pursuing. It also identifies and discusses the strengths and weaknesses of the Association. Much of the work for the strategic audit was done in preparing the AMFR; that work will only need updating. Another document to refer to as a model is the American Association of School Librarians' *Future Structure Report* (AASL, March 1984), which has elements of a strategic audit and of strategy formulation.

The ACRL Strategic Planning Task Force should work closely with ACRL headquarters staff to prepare this report. It should be completed three months after step 3 is completed (i.e., end of month 12). Step 3 should be completed before step 4, but a good deal of the work can proceed simultaneously.

5. Review and revise as needed the ACRL mission, goals, and objectives. This step should be done with the ACRL strategic audit in hand. While the mission, goals, and objectives were revised in the preparation of the AMFR, another careful review will be necessary in light of the information turned up in steps 1–4.

This review should be carried out by the ACRL Strategic Planning Task Force. It should be completed two months after step 4 is completed (i.e., the end of month 14).

Strategy formulation

6. Carry out activities planning. First, it is necessary to refer back to the strategic audit for an analysis of the current mix of programs, services, and research activities. Recommendations can then be made to alter the mix by modifying, dropping, or adding activities.

This step can be worked on at any time, but it cannot be successfully completed before the completion of step 5. The ACRL Strategic Planning Task Force should produce written recommendations on activities within one month of the end of step 5 (i.e., the end of month 15).

7. Carry out resources planning. This step involves reviewing ACRL resources currently available and those needed in the future. It includes organizational resources, human resources (ACRL headquarters staff and the membership), office facilities and equipment available to ACRL, financial resources, and the ACRL management information system. For financial and organizational issues, the *ALA Operating Agreement* will be a useful document. The advantages and constraints of the present relationship between ALA and ACRL should be studied.

A resources planning report should be completed within one month of the end of step 6 (i.e., the end of month 16). It is recommended that headquarters staff prepare the resources planning report according to guidelines from the Task Force.

8. Evaluate and select best strategic alternatives. Essentially this step brings together the step 6 and 7 reports, and decisions are made concerning the mix of activities and the resources needed to support them. An important consideration is the feasibility of implementing the various alternatives.

The ACRL Strategic Planning Task Force will do this evaluation and will prepare the following report, within two months of the end of step 7 (i.e., end of month 18).

9. Prepare a written five-year ACRL strategic plan. A five-year period was selected for the plan to cover because it is a reasonable time span in terms of forecasting. It would be difficult to make predictions any further in advance for internal factors such as member needs and for external factors such as advances in technology. Also, a five-year plan would mesh well with the Activity Model, which looks ahead to the year 1990. The first five-year plan should be developed to cover from 1986 to 1990.

The plan should focus on the strategies selected in the preceding step. It should also draw on other key steps in the planning process by synthesizing work done in the strategic audit and in the activities and resources planning reports. The plan should demonstrate how activities and services relate to organizational goals. It should provide clear and specific direction to all of the elements within ACRL (governance bodies, headquarters staff, sections, etc.). Documents such as the mission and goals statements and possibly some of the previous planning reports could be included in the appendix. The ACRL Strategic Planning Task Force produces this report (at the end of month 18) as its last major activity.

Strategy implementation

10. Implement the strategy that has been developed. The ACRL Planning Committee will oversee and coordinate the implementation of the strategies described in the written plan.

Evaluation

11. Evaluate. Since the strategic plan is designed to cover a five-year period, it could be reviewed and updated either annually or biennially. During each review, one or two years could be added to the period covered so that the plan is self-perpetuating. This review and update would be conducted by the ACRL Planning Committee, which would also evaluate the effectiveness of the plan and progress in its implementation. On an ongoing basis, the Committee would also informally monitor factors which might affect Association plans and activities.

Recommendations for executing the planning process

The subcommittee recommends the following for executing the above described planning process:

Recommendation 1. This report describing the planning process should be disseminated as widely as possible within ACRL. It should be published in *College and Research Libraries News*, and in other ways brought to the attention of ACRL members.

Recommendation 2. Once a revised report is accepted, an ACRL Strategic Planning Task Force should be appointed immediately to begin coordinating the planning process.

The Task Force should have 7 members, including a) at least two regular members of the ACRL Planning Committee; b) one past ACRL president; c) the ACRL executive director; d) the ACRL vice-president/president elect; and e) two additional members.

Recommendation 3. To kick off the planning process, a facilitator should be hired to work with the Task Force for one day to explain considerations in strategic planning, etc.

Recommendation 4. The ACRL Board of Directors should set aside appropriate funds to support the work of the Task Force. Such funding should allow additional meetings of the Task Force beyond those possible in conjunction with ALA conferences. Perhaps extra meetings could be scheduled to coincide with ACRL executive committee meetings, which some of the Task Force members would be attending.

Recommendation 5. The target date for the completion of this project should be no later than the annual ALA conference in the summer of 1986. Based on the time estimates in this document, it will take approximately 18 months to complete the planning process.

Recommendation 6. Finally, the charge of the Planning Committee should be revised to place more emphasis on *planning* as a primary responsibility. Within ACRL's governance structure, the committee should be responsible for developing plans and strategies which will help the Association achieve its goals and objectives. This responsibility is not adequately described in the current charge. In addition, the task of reviewing and revising the five-year plan should be added to the charge.

Editor's Note: The authors prepared this report as members of an ad hoc subcommittee of the ACRL Planning Committee. Susan Klingberg, chair, is from California State University, Sacramento, and Keith Russell is from the Council on Library Resources, Washington, D.C. On June 25, 1984, the full ACRL Planning Committee endorsed this report. At its meeting on June 26, 1984, the ACRL Board of Directors voted to endorse and support the planning process described in the report and to appoint a Strategic Planning Task Force. ■■